Customer 360 Guide for Retail

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CONTENTS

CUSTOMER 360 GUIDE FOR RETAIL

Explore the power of multi-cloud solutions to create customer experiences that connect with customers, grow your business, and provide resilience to market changes.

The assets in this Customer 360 Guide help you build a vision for the future of your retail business and implement the changes needed to fully realize your digital transformation. Learn with Trailhead

Architectural diagrams and business scenarios show you how Salesforce products combine with industry best practices to expand your business capabilities. Solution Kits show you how to implement Salesforce-recommended cross-cloud solutions to common retail use cases.

Industry Blueprint for Retail
Get key product and industry information you can use to uncover opportunities and build retail solutions.

Reference Architecture for Retail
Map specific Salesforce products to the functional and platform capabilities needed for retail business to thrive.

Business Scenarios for Retail
Business scenarios help you bridge the gap between your organization's business capabilities and the solutions needed to achieve your goals. For each scenario, discover a variety of Salesforce solutions that reduce your time to value and allow you to define a roadmap to build out your organization's functionality.

Solution Architecture for Retail
Identify specific tools and resources that you need to deliver cross-cloud retail solutions for your business.

Solution Kits for Retail and B2C
Enhance your retail business by implementing one or more solution kits. Get product recommendations, workflow details, and instructions to help you implement the solution from start to finish.

SEE ALSO:

Customer 360 Guide for Retail Learning Map

Customer 360 Guide for Retail: Quick Look

Customer 360 Guides: Quick Look
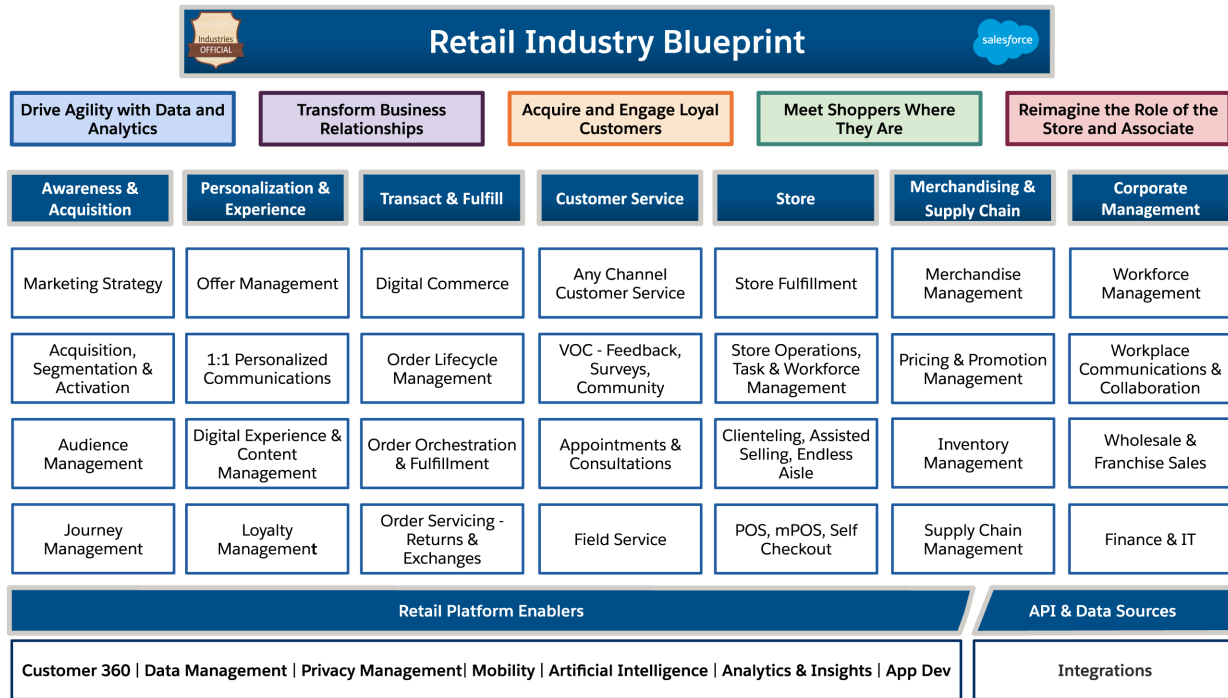
Industry Blueprint for Retail

Get key product and industry information you can use to uncover opportunities and build retail solutions.

The industry blueprint diagrams the end-to-end retail process, from customer acquisition to analytics and optimization. Learn with Trailhead

Use the industry blueprint to lay the groundwork for your digital transformation.

- Map common B2C retail business capabilities to the stages of the customer lifecycle and front-office processes.
- Determine which capabilities are most important to your organization, and create alignment with cross-functional stakeholders.
- Understand the high-level platform capabilities needed to power your organization's business needs.

Contact your Salesforce account team or a Salesforce partner for help with assessing the business and platform capabilities most suited for your organization.

Retail Industry Blueprint

Drive Agility with Data and Analytics	Transform Business Relationships	Acquire and Engage Loyal Customers	Meet Shoppers Where They Are	Reimagine the Role of the Store and Associate

Awareness & Acquisition	Personalization & Experience	Transact & Fulfill	Customer Service	Store	Merchandising & Supply Chain	Corporate Management
Marketing Strategy	Offer Management	Digital Commerce	Any Channel Customer Service	Store Fulfillment	Merchandise Management	Workforce Management
Acquisition, Segmentation & Activation	1:1 Personalized Communications	Order Lifecycle Management	VOC - Feedback, Surveys, Community	Store Operations, Task & Workforce Management	Pricing & Promotion Management	Workplace Communications & Collaboration
Audience Management	Digital Experience & Content Management	Order Orchestration & Fulfillment	Appointments & Consultations	Clienteling, Assisted Selling, Endless Aisle	Inventory Management	Wholesale & Franchise Sales
Journey Management	Loyalty Management	Order Servicing - Returns & Exchanges	Field Service	POS, mPOS, Self Checkout	Supply Chain Management	Finance & IT

Retail Platform Enablers	API & Data Sources
Customer 360	Data Management	Privacy Management| Mobility	Artificial Intelligence	Analytics & Insights	App Dev	Integrations

The retail industry blueprint shows a product-agnostic overview of key business capabilities common to most B2C retailers.

The business processes of a typical lifecycle of a customer relationship can be organized into seven phases.

1. Awareness and Acquisition

2. Personalization and Experience

3. Transact and Fulfill

4. Customer Service

5. Store

6. Merchandising and Supply Chain

7. Corporate Management

Capabilities within the seven phases can be grouped into five areas: Drive Agility with Data and Analytics, Transform Business Relationships, Acquire and Engage Loyal Customers, Meet Shoppers Where They Are, and Reimagine the Role of the Store and Associate. These are the business needs that must be satisfied at each stage of the lifecycle for the retailer to achieve business success.

💡 Tip: To understand which business capabilities, solutions, and Salesforce products can help your organization achieve the business needs identified on the blueprint, dive deeper into B2C business scenarios.

Platform enablers, APIs, and data sources are common to all lifecycle stages and business processes. Use platform enablers, APIs, and data sources as a baseline of functionality to support tailored solutions.

📝 **Note:** To understand how industry and business requirements link to the underlying technologies that support them, review the Reference Architecture for Retail on page 3. Use the B2C industry blueprint as a building block for creating a reference architecture for planning customer experience enhancements.

SEE ALSO:

Industry Blueprints for Partners

Salesforce Architectural Diagrams: Quick Look

Reference Architecture for Retail

Solution Architecture for Retail

Reference Architecture for Retail

Map specific Salesforce products to the functional and platform capabilities needed for retail business to thrive.

To build end-to-end solutions that meet the needs of customers through the entire purchase process, businesses must deliver solutions across teams and technology stacks. The reference architecture helps communicate the vision and strategy of a solution to business executives and stakeholders. Learn with Trailhead
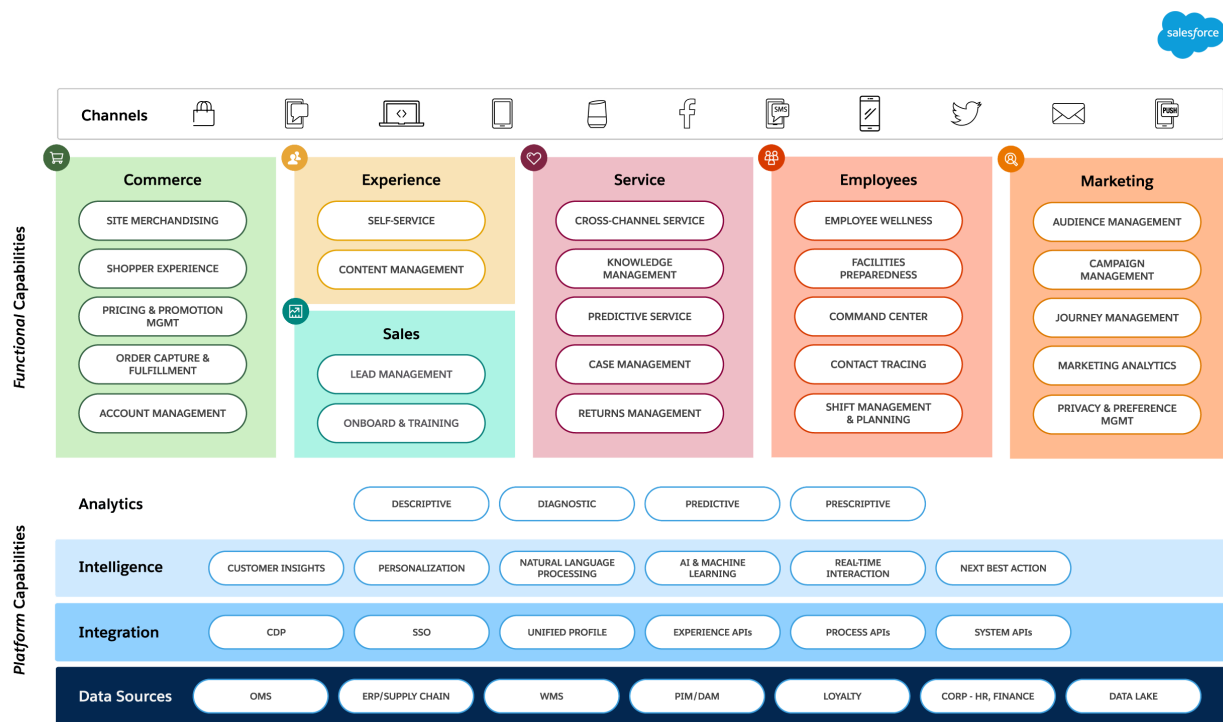
Business success can be conceptualized as success in each of three categories of capabilities: *Foundational*, *Platform*, and *Functional*.

Our reference architecture presents *Platform* and *Functional* capabilities. Each layer contains a representative subset of systems or capabilities that are most relevant in the B2C Retail space. It does not list all possible systems or capabilities.

Platform Capabilities

These components form the underlying technology base for achieving your goals. Each layer in the platform builds on top of the next. B2C systems typically rely on these elements.

Data Sources

Data sources are systems that create, collect, and manage various types of data. These systems can act as systems of record. They're often purpose-built to handle particular functionality and data requirements, but some provide for general system needs.

Integrations

Integrations include tools and routes that connect systems of record with each other or with higher-level experiences. These are varied tools, such as APIs that connect separate systems, single sign-on services to manage customer identity across different interfaces, and customer data platforms to segment customers.

Intelligence

Smart automation like machine learning and AI helps you optimize your use of customer data. The intelligence layer serves functions like delivering actionable customer insights, personalized product recommendations, and improving real-time customer interactions to enhance your customer relationships and drive sales.

Analytics

Analytics helps you better understand your data and make smart business decisions.

- *Descriptive analytics* summarize existing data to help you better understand current state or past activities. These analytics typically answer "What?" questions about your data.

- *Diagnostic analytics* use the output of descriptive analytics to identify patterns and outlier data. These analytics typically answer "Why?" questions about your data.

- *Predictive analytics* use historic data to attempt to anticipate future outcomes, such as the likelihood that a subscriber opens an email.

- *Prescriptive analytics* suggest future courses of action based on your existing data. These analytics typically answer "Should?" questions about your future actions.

Functional Capabilities

Business-specific elements at the functional capabilities level are connected more directly to the customer's experience and measured in terms of maturity. Successful implementation of functional capabilities depends heavily on implementation of the platform capabilities.

The retail life cycle typically crosses multiple engagement channels in the areas of *Commerce*, *Communities*, *Sales*, *Service*, and *Marketing*. Capabilities in the *Operations* area can help companies address new business needs related to the Covid-19 pandemic.

Review these commonly-required functional capabilities to identify strategic goals around which to focus your implementation.

A Business Capability Maturity Assessment arranged by your Success Manager or Account Executive can help you determine which areas of your business can benefit from additional focus.

Mapping Platform Capabilities to Salesforce
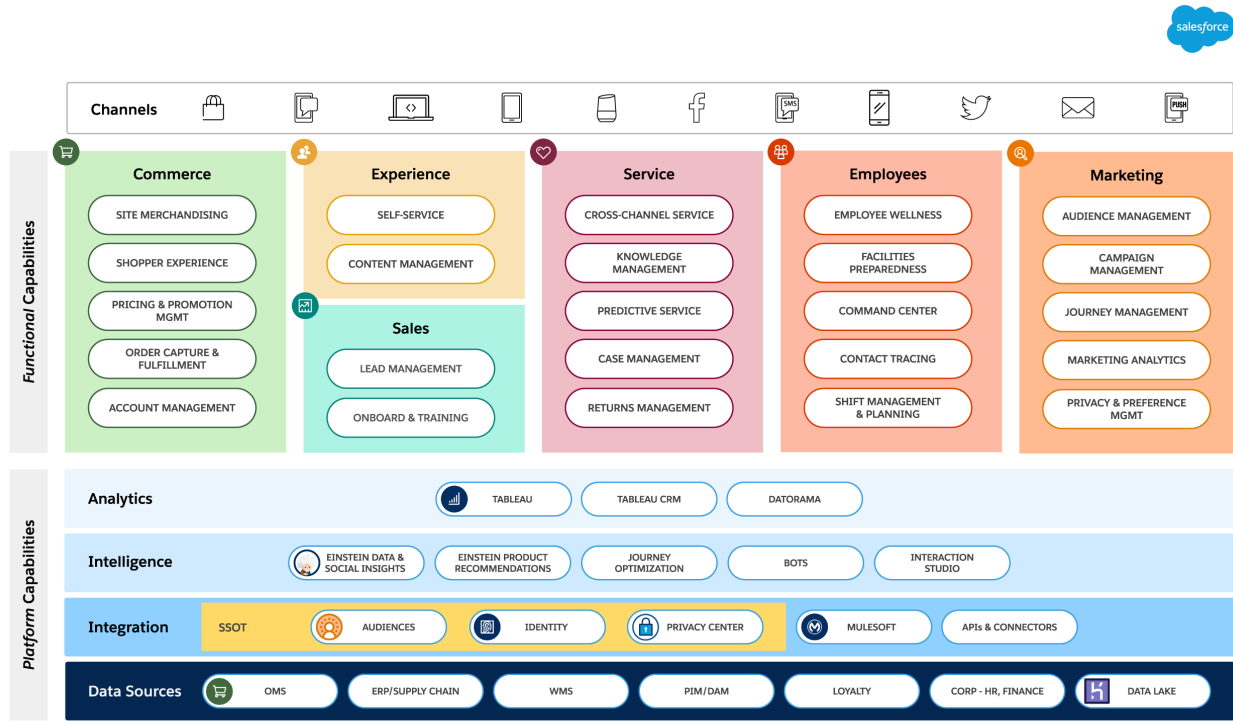
Specific Salesforce products handle each of the needs identified at the platform capability level.

Identify gaps in your underlying capabilities by customizing this model to include other Salesforce products or third-party systems in your current technology stack. To explore the reference architecture specific to your business, contact your success manager or account team.

💡 **Tip:** Business scenarios help you better understand your business capabilities and find solutions that support your business goals.

Learn more about Salesforce products.

- Retail Industry Solution
- Commerce
- Communities
- Service
- Sales
- Work.com
- Marketing
- Data Cloud

- Customer 360 Privacy Center

SEE ALSO:

Business Scenarios for Retail

Business scenarios help you bridge the gap between your organization's business capabilities and the solutions needed to achieve your goals. For each scenario, discover a variety of Salesforce solutions that reduce your time to value and allow you to define a roadmap to build out your organization's functionality.

Successful execution of core functions requires an organization to have certain expertise, or business capabilities. Understanding what business capabilities are needed to achieve this scenario helps cross-functional teams in your organization align and better strategize around technology solutions.

Get the Most Out of Best Practices

Following best practices, and selecting the right solutions and products for your organization are key to a successful implementation of business scenarios. Follow these steps to make use of business scenarios.

1. Review business capabilities required to achieve this business scenario.

2. Assess the maturity levels of your organization's business capabilities.

3. Review the best practices with minimum maturity level to understand how your business can improve in each area of capability.

4. Review products and solutions to get quick time to value and build a roadmap as you increase your maturity.

To arrange a Business Capability Maturity Assessment, contact your Success Manager or Account Executive.

Explore B2C Business Scenarios

Data-Driven Advertising

Exceed customer expectations by delivering personalized advertising across all of a customer's devices in a secure, privacy-compliant manner.

Customer-Centric Journeys

Drive engagement and purchases by sending your shoppers on relevant, personalized journeys.

Engage Shoppers on Every Channel

Unify your marketing and commerce to better adapt to customer preferences and provide relevant, behavior-based intelligent communications that engage customers and drive sales.

Deliver Seamless Digital Service

Improve the customer service experience by offering quick and convenient access to the information and data needed to complete a task or resolve an issue.

Create Amazing Customer Experiences

Deliver engaging apps in any language tied to your CRM and other systems.

Digitize the Store Experience

Rapidly respond to customers and employees in the new normal of the digital retail store experience.

Understand Business Capability Maturity Levels

To achieve success in each practice area, an organization must reach defined levels of maturity. We divide business capability maturity into five levels.

Data-Driven Advertising

Exceed customer expectations by delivering personalized advertising across all of a customer's devices in a secure, privacy-compliant manner.

Understanding your customer starts with data. Delve into your data to develop a deeper understanding of your target shoppers, reach new levels of personalization, and increase audience reach with secure, targeted campaigns.

Recommended Products

These products can help you deliver data driven advertising.

- Marketing Cloud
- B2C Commerce

Contact your Success Manager or Account Executive for more information.

Solutions

Get quick time to value by selecting Salesforce recommended solutions that you can implement immediately, while putting together a roadmap to build out more mature capabilities over time. To help you find solutions that your business is ready for right now, resources are divided into three levels depending on complexity.

Beginning

- Use Lookalikes to Advertise on Social Channels
- Control B2C Commerce Promotions
- Create a B2C Commerce Promotion
- Create Product Feeds from Commerce to Facebook for Dynamic Ads and Facebook Shopping
- Learn Audience Segmentation Basics
- Implement SEO Best Practices
- Get Started: Marketing Cloud: Advertising Studio

Intermediate

- Use Salesforce Standard Consent Objects to Honor Customer Preferences
- Integrate Order History to Build Targeted Segments For Lookalikes
- Analyze Customer Referral Data to Optimize Ad Spend
- Match Third-Party Data to First-Party Data For Better Segment Definition
- Set Up B2C Commerce A/B Testing
- Keep Customers up to Date on Store Openings with Email and Ads (contact your Salesforce account team)

- Learn About B2C Commerce Site Merchandising Analytics
- Measure Your Marketing Impact
- B2C Commerce Einstein Implementation Guide
- Use Advertising Audiences
- Uncover Audience Insights
- Be Customer Driven With Data-Driven Marketing

Advanced

- Set Up B2C Commerce A/B Testing
- Personalize ads in real-time based on products viewed on Commerce sites (contact your Salesforce account team)
- Understand Consumer Behavior Across Web Properties, Mobile Apps, and Devices
- Optimize Data, Audiences, and Digital Advertising

Contact your Success Manager or Account Executive for more information.

Business Capabilities

Your organization's implementation of a capability can range from undeveloped to industry-leading. For each capability, we list best practices that you can use to grow your maturity and provide information on solution implementation.

Marketing Capabilities for Data-Driven Advertising

Enhance these business capabilities to better target your customers with personalized marketing.

Service Capabilities for Data-Driven Advertising

Focus on these capabilities to retain customers with first-class customer service.

Commerce Capabilities for Data-Driven Advertising

Use data to understand what customers are looking for when they visit your ecommerce site.

SEE ALSO:

Understand Business Capability Maturity Levels

Business Scenarios for Retail

Customer-Centric Journeys

Engage Shoppers on Every Channel

Deliver Seamless Digital Service

Create Amazing Customer Experiences

Marketing Capabilities for Data-Driven Advertising

Enhance these business capabilities to better target your customers with personalized marketing.

AUDIENCE STRATEGY

Define an approach to what audiences are required and how they are developed, grown, nurtured, and applied to support customer-centric marketing.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	We use a basic approach, not a comprehensive strategy which we reference on an ad hoc basis and rarely update.
Recommended Maturity Level	3 (Practicing)	We have a somewhat comprehensive strategy that we reference and update infrequently.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Identify specific marketing objectives.

2. Identify the marketing initiatives, programs, and campaigns required to reach marketing objectives.

3. To target or suppress audiences, consider these questions:

   - Which age range should we target?

   - Which cultural era did people in the target audience grow up in? What media and products are they familiar with?

   - Which part of the country or world is the target audience most likely to live in?

   - What motivates them to make a certain purchase?

   - What price points are people in the target audience most likely to go for without straining their wallets?

   - What problems do people in the target audience want to solve with this product or service?

   - Can I relate to this market segment?

4. Identify the data sources, attributes, values required to locate people in the target audience.

5. Audit current audience attribute data compared to ideal data.

6. Develop a roadmap for nurturing existing audiences, acquiring data, and building new audiences.

7. Review business performance measurement tests to understand the value of various audiences.

CUSTOMER SEGMENTATION

Divide shoppers and prospects into logical segments to inform customer experience strategy.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We define customer segments based only on a combination of demographics and behaviors.
Recommended Maturity Level	4 (Optimized)	We define customer segments based on a combination of demographics, behaviors, and attitudes.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Establish marketing goals for this segment.

2. Determine audience behavioral goals in context, for example, what a consumer can reasonably be expected to do in a specific circumstance. Good sources of behavioral data include:

   - Conversions
   - Specific site section visitors
   - Top funnel visitors
   - Users who were exposed to or clicked digital media
   - High value visitors
   - Visitor churn

3. Formulate hypotheses about your audience that you'd like to validate with segment creation and analysis.

4. Before creating a segment, review existing segments to determine if they are a potential match.

5. Create audience segments using multiple criteria including behavior, preferences, demographics, and lifestyle. Prioritize first-party data over second-party data, and second-party data over third-party data.

6. Name segments according to a standard pattern. Include contextual words or abbreviations to make it easier to find and share segments with others.

7. If possible, use recency and frequency information to modify your segment definitions.

8. Create a segment taxonomy (classification schema, like a hierarchy or folders) that is intuitive.

9. Examine the size of the audience. Consider whether it requires immediate nurturing to grow.

10. Determine if the segment is incremental to your existing or target audience. If not, modify criteria for inclusion in the segment.

11. Document and share the why, how, overlap, details, and persona of the segment you've created.

AUDIENCE NURTURING

Grow an audience by using audience or segment overlaps or lookalike models to increase size and scale of audience and reach.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	1 (Minimal)	We rely exclusively on lookalikes sourced from advertising platforms.
Recommended Maturity Level	3 (Practicing)	We use lookalikes from advertising platforms but also extend reach through overlaps and curate some of our own lookalikes. We do some performance testing.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Create marketing programs that drive customers into the segment by encouraging or rewarding desirable behavior. For example, offering a coupon for registering with a website, or after watching a video.

2. Run segment overlap analysis to find segments to identify segments with complementary audience attributes but low overlap. Use the results to update your original segment or create one.

3. Use a lookalike feature or a data science modeling approach to generate lookalikes for the segment you've created. Evaluate the accuracy (similarity) versus scale (incremental size of segment).

4. Maximize reach by opting for a lookalike similarity rate under fifty percent if you're unconcerned with targeting precision. For increased targeting precision, use a similarity rate of under seventy percent.

5. Use marketing platform features, an identity partner's solution, or data science modeling to identify more devices users in your segment are likely to own. Adding devices improves the likelihood of reaching or suppressing the desired segment.

6. Evaluate the change in segment size each month to determine if extra nurturing is required.

7. Use consistent testing to measure the incremental value of each lookalike.

AUDIENCE ACTIVATION

Proactively target or suppress defined audiences in support of customer-centric marketing.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	Less than 25 percent of our campaigns include audience targeting.
Recommended Maturity Level	3 (Practicing)	About 50 percent of our campaigns include audience targeting.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. List all marketing campaigns and initiatives.

2. Identify which audiences should be targeted or suppressed.

3. To set realistic expectations, examine the match rates with the marketing platforms and partners where the segment is activated. If the estimated size of the matched segment population is low, consider adding or activating more segments that don't have heavy overlap.

4. Depending on your campaign objectives and category, monitor audience reach and performance daily or weekly.

5. Classify and document each campaign, initiative, and audience using metadata descriptors.

6. Keep documents updated to understand overlapping targeting, audience targeting duplication.

7. Measure the percentage of marketing campaigns and initiatives that use targeting or suppression.

8. Create target percentages by quarter. Include data showing progress in monthly transformation roadmap reviews.

9. Report out monthly to senior marketing and executive leadership along with improvements in key progress indicators.

TESTING

Apply A/B and multivariate tests to understand the impact of different marketing elements and tactics on business performance.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	We do ad hoc testing for a specific marketing effort.
Recommended Maturity Level	3 (Practicing)	We do ad hoc testing of several marketing efforts each year.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Set up A/B testing.

2. Move to multi-variate testing.

3. Employ advanced measurement models that offer aggregated results. Drill down to review performance at the individual level, controlling for variable and across time periods.

4. Use instrumentation to understand performance by channel, campaign, placement, and creative elements.

5. Require marketing and planning teams to make campaign and audience selection decisions that rely on data-driven insights.

CONSENT MANAGEMENT

Honor customer preferences for use of data and data portability. Comply with consent rights policies and regulations.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	We use a basic approach to consent management where users are notified that they are automatically agreeing to our preferred consent settings. It's difficult for users to override our preferred settings.
Recommended Maturity Level	4 (Optimized)	Our consent management system requires some development to adapt to new or changing regulations. It uses positively declared, not automatic, consent. It's easy for users to see or change consent settings.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Allow customers to easily and flexibly manage right-to-be-forgotten tasks.

2. Ensure that customer data policies are compliant with current regulations and can easily be adapted to changes in regulations or by geographic area. Policies should include:

    • Ensure that data processes port customers' data to other systems as much as possible.

    • Minimize degradation of the value of and ability to use customer data in other systems.

    • Allow customers to easily and flexibly manage their opt-in or opt-out status.

- Keep opt-in or opt-out policies compliant with current regulations.

3. Implement consent rights management so that your system is easily configurable to adapt to changes. in regulations & by geographic area.

4. Regularly review and update policies and configurations.

SINGLE VIEW OF THE CUSTOMER

Align relevant data sources at the individual customer level to support customer-centric marketing efforts.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	We lack a robust identity solution. Less than twenty-five percent of high priority data sources align.
Recommended Maturity Level	4 (Optimized)	We have a pretty solid identity resolution but it could be improved. About seventy-five percent of high priority data sources align.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Identify the most critical data sources based on customer lifecycle stages and moments that matter, prioritizing the top three to five customer journeys. Use the top journeys to inform business requirements for data alignment or integration work.

2. Create a data model with primary and secondary customer ID fields and keys.

3. Use an identity solution to connect users across devices using both deterministic and probabilistic approaches.

4. Add secondary priority data sources.

Service Capabilities for Data-Driven Advertising

Focus on these capabilities to retain customers with first-class customer service.

CUSTOMER SEGMENTATION

Align corporate customer segmentation models to determine service support and channel strategies.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We use cross channel service and experience differentiation based on customer attributes like spending, geography, service level agreement.
Recommended Maturity Level	4 (Optimized)	We use a shared common segmentation model across sales, service, and marketing.

Best Practices

> To increase your business maturity for the capability, implement the recommended best practices.

- Segment customers by demographics, behavior, geography, benefit, or customer journey or other relevant qualities.
- Create customer profiles crafted to provide useful information and context for each customer.
- Tailor customer support experiences based on customer segment. For example, target specific customer segments for more or less personalized service based on spend or value.
- Address concerns before they arise and make every customer service interaction a special one.

MODERN ARCHITECTURE APPROACH

All lines of business in the customer journey have a full enterprise view of each customer, including profile, preferences, products, and services.

Capability Maturity

> The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	Our agents have to access multiple systems to gather customer data. We have basic automated cross channel customer visibility
Recommended Maturity Level	4 (Optimized)	Most relevant customer service data is available in one system with cross channel visibility.

Best Practices

> To increase your business maturity for the capability, implement the recommended best practices.

- Aggregate structured and unstructured data about each customer from across the organization for a unified customer view.
- Use the unified customer view that includes segment data to build personalized interactions for every customer regardless of where the interaction happens.

Commerce Capabilities for Data-Driven Advertising

Use data to understand what customers are looking for when they visit your ecommerce site.

CUSTOMER SEGMENTATION

Divide shoppers and prospects into logical segments to inform customer experience strategy.

Capability Maturity

> The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	We have minimal data with which to segment existing customers.
Recommended Maturity Level	4 (Optimized)	We have robust data for existing customers and limited data for prospects.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Continuously review defined segments against customer behaviors.

2. Benchmark each segment with defined key performance indicators as a tool to measure success.

CAMPAIGN STRATEGY

Promotional strategies are based on business goals and key performance indicators.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	Campaign teams meet regularly to strategize.
Recommended Maturity Level	4 (Optimized)	Campaign teams have a centrally managed campaign plan.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Regularly review data and analytics to better understand your customer behaviors.

2. Benchmark promotions and then use analytics to measure success.

3. Understand your organizational business goals.

4. Use the data to inform your promotional strategy, including types of promotions, products used, frequency, and cadence.

WELCOME EMAIL

An email journey welcomes customers who sign up for emails or register on a site or app.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We've laid out a welcome email program and started deploying it.
Recommended Maturity Level	4 (Optimized)	We have a welcome email journey but don't use A/B testing to measure or optimize it.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Identify types and cadence of emails to send in a welcome journey.

2. Define benchmarks and key performance indicators to measure performance.

3. Use A/B testing to understand if the welcome journey meets benchmarks and key performance indicator goals.

4. Periodically review welcome journey performance and update messages.

SOCIAL ACQUISITION

Align on possible offers. Plan and manage direct acquisition campaigns and monitor campaign effectiveness.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We are in the process of building an acquisition strategy from our social channels to convert and retain customers.
Recommended Maturity Level	4 (Optimized)	We have a simple acquisition strategy in place.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Use customer insights to select social channels to focus on.

2. Define acquisition strategies and campaigns for each social channel.

3. Monitor and measure campaigns. Pivot as needed.

Customer-Centric Journeys

Drive engagement and purchases by sending your shoppers on relevant, personalized journeys.

Shoppers want premium experiences and content that is relevant for them. Personalized experiences yield a 4.5 times higher per-visit spend. However, 64 percent of shoppers agree that retailers don't truly know them.

Personalization allows you to enhance your marketing by making messages smarter and more focused. Use Salesforce to know your customers better, implement personalized messaging, and engage with shoppers at scale.

Recommended Products

These products can help you deliver customer-centric journeys to your customers.

- Marketing Cloud
- B2C Commerce
- Service Cloud

Solutions

Get quick time to value by selecting Salesforce recommended solutions that you can implement immediately, while putting together a roadmap to build out more mature capabilities over time. To help you find solutions that your business is ready for right now, resources are divided into three levels depending on complexity.

Beginning

- Control B2C Commerce Promotions
- Create a B2C Commerce Promotion

- Engage Shoppers with Personalized Marketing Email Webinar

- Learn About Audience Segmentation Basics

- Use Dynamic Customer Groups for Active Merchandising

- Display Targeted Messaging with Content Slots in B2C Commerce

- Get to Know Marketing Cloud

- Get Started: Marketing Cloud: Email Reporting Basics

- Get Started: Email Studio: Building, Testing and Sending Email

- Get Started: Email Studio: Email Marketing Best Practices

- Get Started: Journey Builder: Journey Strategy

- Get Started: Marketing Cloud: Admin+Deliverability

- Get Started: Marketing Cloud: Content Builder

- Get Started: Marketing Cloud: Data and Segmentation Basics

- Get Started: B2C Commerce: Einstein Product Recommendations

- Help Your Business With a CDP

- Build a Business Case for Data Transformation and a CDP

Intermediate

- Personalize Marketing Recommendations

- B2C Commerce Predictive Sort

- Einstein for Commerce Product Overview

- B2C Commerce Einstein Implementation Guide

- See Einstein Recommendations for Marketing Product Overview

- See Einstein Recommendations for Marketing Implementation Guide

- Order on Behalf of a Customer

- View Search Results and Sorting Rules

- Redeem Coupons

- Turn Abandoned Carts into Completed Sales

- Use Marketing Cloud Connect to Integrate with Salesforce CRM

- Get Started: Email Studio: Building, Testing and Sending Email

- Automate Data Imports: Marketing Cloud

- Use Marketing Cloud Connect

- Get Started: Email Studio: Email Personalization Basics

- Get Started: Marketing Cloud: Marketing Cloud Connect Overview

- See Identity Resolution

- Set Up Salesforce CDP

- Delete Personal Data

- Restrict How to Process Personal Data

- Give Customers Their Data when They Want It

- Satisfy Customer Requests and Data Privacy Laws

- Be Customer Driven With Data-Driven Marketing

Advanced

- Optimize Data, Audiences, and Digital Advertising
- Review Real Time Personalization Across All Channels (IS)
- Leverage AI in Your Marketing Strategy with Einstein for Marketing
- Use Einstein Engagement Scoring - Accelerator Webinar: Marketing Cloud

Contact your Success Manager or Account Executive for more information.

Business Capabilities

Your organization's implementation of a capability can range from undeveloped to industry-leading. For each capability, we list best practices that you can use to grow your maturity and provide information on solution implementation.

Marketing Capabilities for Customer Centric Journeys

Keep your customers at the heart of your marketing with customer-centric journeys and messaging.

Commerce Capabilities for Customer Centric Journeys

Create a personalized marketing experience for your customers using browse control, site and cart recommendations, merchandising, behavioral email strategy, and campaign planning and strategy.

SEE ALSO:

Understand Business Capability Maturity Levels

Business Scenarios for Retail

Data-Driven Advertising

Engage Shoppers on Every Channel

Deliver Seamless Digital Service

Create Amazing Customer Experiences

Marketing Capabilities for Customer Centric Journeys

Keep your customers at the heart of your marketing with customer-centric journeys and messaging.

JOURNEY DESIGN

Having a process in which all relevant teams collaborate to design customer-centric journeys across all possible channels.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We've defined lifecycle stage or segment-specific journeys that include two to three channels.
Recommended Maturity Level	4 (Optimized)	We've defined individual-level personalized, cross-channel journeys that include almost all channels.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Identify marketing objectives, campaigns to support each objective, audience targeting requirements, data variables, attributes needed. Map where and how these are sourced. Apply a journey design roadmap.

2. Hold a cross-functional workshop to define the customer lifecycle and identify moments that matter.

3. Prioritize journeys based on evaluation criteria and create a journey backlog.

4. Start by defining a simple single-channel journey. For example, a welcome email triggered by a registration or conversion event.

5. Evolve journeys to multiple channels. Connect multiple journeys.

6. Incorporate experience design principles in journeys.

PERSONALIZATION

Tailoring marketing messages to the individual customer based on what is known and predicted about the customer.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	Next best offer analysis is done in an ad hoc manner using a relatively basic approach that isn't easy to incorporate into marketing execution.
Recommended Maturity Level	4 (Optimized)	At least annually, a reasonably robust next best offer analysis approach is used that is relatively easy to incorporate into marketing execution.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Use persona modeling, segmentation analysis, or both, to assess your current customers.

2. Identify gaps in personalization by reviewing customer need states, moments that matter, and preferences.

3. Overlay implicit and explicit customer data to increase relevancy.

4. Build a content repository which can effectively address key customers' interests.

5. Build and implement a test-and-learn strategy to continually learn about and optimize your programming.

PREFERENCE MANAGEMENT

Enable customers to convey and manage their communication preferences including for content, language, channels, and basic privacy such as opt-outs. Use AI to infer preferences.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	Customers are able to select preferences, but are unable to update them easily.
Recommended Maturity Level	5 (Leading)	Customers can choose to share additional data and easily update their preferences which then inform personalization.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Make it easy for customers to state and change their content, language, and channel preferences.

2. Make it clear to customers how to manage basic privacy considerations such as opt-ins.

3. Use AI to infer preferences

4. .Streamline preference management across touchpoints by incorporating preference management into your identity system.

REAL-TIME INTERACTION MANAGEMENT

Delivering contextually relevant experiences, value, and utility at the appropriate moment in the customer life cycle via preferred customer touchpoints.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	We have a tool that could support this use case, but we never use it
Recommended Maturity Level	3 (Practicing)	We use the tool on an ad hoc basis with a moderate degree of success.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Optimize the initiation and progression of campaigns based on near real-time individual behavior and intent.

2. Leverage known user data to personalize and contextualize the campaign message.

3. Attribute campaign influence to downstream milestones such as generating leads and opportunities.

4. Orchestrate interaction across channels to control saturation and fatigue.

Commerce Capabilities for Customer Centric Journeys

Create a personalized marketing experience for your customers using browse control, site and cart recommendations, merchandising, behavioral email strategy, and campaign planning and strategy.

BROWSE CONTROLS

Set up and manage refinements and dynamic sorting rules to support the customer in browsing activities on the site.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	We make some adjustments based on some customer and internal feedback.
Recommended Maturity Level	3 (Practicing)	We make regular adjustments based on some customer, internal feedback and developer bandwidth.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Understand your customers and prospects and their shopping behaviors.

2. Ensure that product data includes attributes to allow customers to refine searches to find products.

3. Define a cadence to review customer patterns and a process for accounting for new attributes and categories.

SITE RECOMMENDATIONS

Place personalized product recommendations throughout the browsing journey to drive conversion and higher per-unit transaction and average order value.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We manually place recommendations on the product details page, category landing pages, and on the home page.
Recommended Maturity Level	4 (Optimized)	We use an intelligent recommendation engine and test it at a few key points along the shopper journey.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Define business goals for your recommendation strategy.

2. Build out locations to deploy recommendations, such as product details page, home page, category landing page and campaign pages.

3. Perform A/B testing to identify the optimal strategy for each location.

4. Deploy and monitor. Periodically perform A/B testing to ensure that strategies continue to perform.

MERCHANDISING

The process of presenting products on the storefront and managing online/offline status.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We regularly highlight different products based on disparate sources of customer insights.
Recommended Maturity Level	4 (Optimized)	We regularly highlight different products based on some sales and customer insight reporting tools.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Automate as much of the product import as possible.

2. Perform quality checks when launching a product.

3. Review product performance reports to inform merchandising strategies.

BEHAVIORAL EMAIL STRATEGY

Define and manage behavioral emails, including segmenting, targeting, AI, and content.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We have a basic abandon cart email program but don't track and test it.
Recommended Maturity Level	4 (Optimized)	We have different behavioral messaging campaigns set up but don't track and test them.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Understand customer on-site behavior to identify opportunities for behavioral emails, for example, when a customer abandons a search, cart, or product description page.

2. Create email journeys for a defined strategy.

3. Define benchmarks and key performance indicators to measure success.

4. Deploy and regularly test to validate benchmarks and key performance indicators.

CART RECOMMENDATIONS

Offer product placement recommendations that are complementary to the items in the cart and which have been tested and validated.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	4 (Optimized)	We use AI to inform our cart recommendations based on the last item added to the cart.
Recommended Maturity Level	5 (Leadging)	We use 1:1 personalization to inform our cart recommendations based on all items in the cart.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Define business goals for your recommendation strategy.

2. Build out locations to deploy recommendations in the cart.

3. Perform A/B testing to validate the best strategy for each location.

4. Deploy and monitor product recommendations. Periodically perform A/B testing to ensure that the selected strategies continue to perform.

CAMPAIGN PLANNING

Work across departments to define and align on campaign and promotion strategy.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	Our ecommerce team creates their own plan.
Recommended Maturity Level	4 (Optimized)	Campaign planning follows an integrated plan across some key departments.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Align on company business goals and key performance indicators.

2. Maintain consistency of experience by defining campaign planning across all channels.

CAMPAIGN STRATEGY

Defined strategy based on business goals and key performance indicators to inform promotional strategy.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	We have a loose plan that we refresh every year.
Recommended Maturity Level	4 (Optimized)	The key teams driving campaigns have a centrally managed campaign plan.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Use data and analytics on a regular basis to review and understand your customer behaviors.

2. Benchmark promotions and then use analytics to measure success.

3. Understand your organizational business goals.

4. Use data to inform your promotional strategy including types of promotions, products used, frequency, and cadence.

Engage Shoppers on Every Channel

Unify your marketing and commerce to better adapt to customer preferences and provide relevant, behavior-based intelligent communications that engage customers and drive sales.

Shoppers have high expectations when they engage with brands and purchase products. They expect to receive personalized, relevant communications whether they're in a store, on the web, or on social media. Turning this vision into reality requires building solutions that connect people across your business and products from different technology areas.

Recommended Products

These products can help you engage shoppers on every channel.

- Marketing Cloud
- B2C Commerce
- Service Cloud
- Customer 360 Data Manager

Solutions

Get quick time to value by selecting Salesforce recommended solutions that you can implement immediately, while putting together a roadmap to build out more mature capabilities over time. To help you find solutions that your business is ready for right now, resources are divided into three levels depending on complexity.

Beginning

- Keep Customers in the Loop with Transactional Email Solution Kit
- Learn About Customer 360 Data Manager
- Help Your Business With a CDP
- Learn About Salesforce CDP
- Get Started: Service Cloud: Digital Engagement
- Get Started: Marketing Cloud: Sending SMS Messages - Accelerator Trailmix
- Get Started: Commerce Cloud: Search Engine Optimization (SEO)

- Get Started: Marketing Cloud: Social Studio
- Get Started: Social Studio: Social Listening

Intermediate

- Manage Campaigns with Journey Builder: New Customer Registration, Order Confirmation
- View Customer 360 Data Manager Product Capabilities
- Redeem Coupons Solution Kit
- Turn Abandoned Carts into Completed Sales Solution Kit
- Offer Buy Online, Pick Up in Store (BOPIS) Solution Kit
- Order on Behalf of a Customer Solution Kit
- Engage Customers with Conversational Commerce Solution Kit
- Set Up Communities for Self Service with Salesforce Identity
- Simplify Authentication for Communities
- Secure Profile with Multi-Factor Authentication
- Market to Customer 360 Audiences
- Deploy Chat: Service Cloud

Advanced

- Learn About Real Time Personalization Across All Channels (IS)
- Order on Behalf of a Customer Solution Kit
- Schedule an Appointment and Implement Virtual Personal Shopping Solution Kit
- Engage Customers with Conversational Commerce Solution Kit
- Set Up Embedded Chat: Service Cloud

Contact your Success Manager or Account Executive for more information.

Business Capabilities

Your organization's implementation of a capability can range from undeveloped to industry-leading. For each capability, we list best practices that you can use to grow your maturity and provide information on solution implementation.

Marketing Capabilities to Engage Shoppers on Every Channel
Market and engage with customers across your business using their preferred channels.

Service Capabilities to Engage Shoppers on Every Channel
Provide service to customers on the channels they prefer.

Commerce Capabilities to Engage Shoppers on Every Channel

Drive customers to your ecommerce site with campaign planning, recommendations, search engine optimization, and customer segmentation.

SEE ALSO:

Understand Business Capability Maturity Levels

Business Scenarios for Retail

Data-Driven Advertising

Customer-Centric Journeys

Deliver Seamless Digital Service

Create Amazing Customer Experiences

Marketing Capabilities to Engage Shoppers on Every Channel

Market and engage with customers across your business using their preferred channels.

CHANNEL STRATEGY APPROACH

A defined approach to the role each marketing channel plays in supporting customer-centric marketing and how channels are used in combination to achieve marketing objectives.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	Strategy exists but is not reinforced by proper data analysis for evolving the strategy.
Recommended Maturity Level	3 (Practicing)	All channel tools are aligned and measured, strategy is in place but is not iterated upon regularly.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Know your customer by channel.

2. Evaluate channels based on cost effectiveness and the ability to reach a large number and percentage of your target audience.

3. Clearly articulate the role each channel plays in delivering a great customer experience for different customer lifecycle stages and segments.

4. Give the customer multiple touch points.

5. Have a flexible channel switching strategy according to how customers are using your channels.

CROSS-SELL AND UPSELL

How marketing helps to support a company's cross-sell and upsell efforts. Prioritizing, developing, managing, measuring customer cross-sell or upsell offers and journeys.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	We do basic messaging within a single channel to support cross-selling or upselling based on basic criteria such as product purchased or customer lifecycle stage.
Recommended Maturity Level	3 (Practicing)	We coordinate targeted messaging across at least two channels to support cross-selling or upselling based on multiple criteria such as the customer's segment, purchase history, and lifecycle stage.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Use lifecycle and behavioral data to enter customers into personalized cross-sell and upsell journeys on the appropriate channels.

2. Use AI to recommend cross-selling and upselling opportunities.

3. Use personalization to deliver the right message to customers.

4. Deliver messages through the correct channels based on past behavior.

5. Use real-time interaction management to effectively arbitrate cross-selling and upselling messages with other messages the customer is eligible for.

LIFECYCLE MARKETING

Tailor marketing messages based on the lifecycle stage the customer is in and advancing the customer throughout the entire cycle.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	We have a defined customer lifecycle, but messaging is only differentiated for acquisition versus retention, not varied by each stage of the life cycle.
Recommended Maturity Level	4 (Optimized)	We have a defined customer lifecycle and out messaging is somewhat tailored to each stage and somewhat coordinated across stages. However, our teams are siloed.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Define your customer lifecycle and consistently use the definition to orchestrate messages across touchpoints.

2. Develop a system to place customers in a lifecycle stage. Create data processes to orchestrate the correct messages and channels to reach customers.

3. Define customer needs and moments that matter to customers at each stage of the life cycle.

4. Incorporate a system to sense and respond in order to move customers through current lifecycle stages and into new stages.

5. Coordinate channels and use personalization to engage customers at each stage of the life cycle.

6. Build a customer-centric capability to create life cycle-driven experiences.

PREFERENCE MANAGEMENT

Enable customers to convey and manage their communication preferences including for content, language, channels, and basic privacy such as opt-outs. Use AI to infer preferences.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	Customers are able to select preferences, but are unable to update them easily.
Recommended Maturity Level	5 (Leading)	Customers can choose to share more data and easily update their preferences which then inform personalization.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Make it easy for customers to state and change their content, language, and channel preferences.

2. Make it clear to customers how to manage basic privacy considerations such as opt-ins.

3. Use AI to infer preferences.

4. Streamline preference management across touchpoints by incorporating preference management into your identity system.

Service Capabilities to Engage Shoppers on Every Channel

Provide service to customers on the channels they prefer.

CHANNEL STRATEGY APPROACH

Plan an approach for handling service requests from multiple channels.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	We have two or more support channels. Our agents are assigned to work within one of our channels.
Recommended Maturity Level	4 (Optimized)	Our agents provide support across channels. Support requests can begin in one channel and continue in another.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

- Tie channel service strategy to overall service strategy. For example, if customer service is the primary goal, determine what level of service, channels, and options to make available by customer segment.

- Determine ideal channels for customers to engage with customer service with the least amount of friction and where the customer's needs are met. This should then align with service strategy.

- Ensure support strategy is in place to support these channels.

- Use customer segmentation models to drive specific customer types to specific channels.

Commerce Capabilities to Engage Shoppers on Every Channel

Drive customers to your ecommerce site with campaign planning, recommendations, search engine optimization, and customer segmentation.

TEST & LEARN

Leverage A/B and other testing to measure and improve your customer-centric site management efforts.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. [Learn More](#)

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	We perform ad-hoc testing for specific efforts.
Recommended Maturity Level	3 (Practicing)	We perform ad-hoc testing of several marketing efforts each year.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Identify third-party tools using your business goals and needs as a driver.
2. Implement, train, and give ownership to key resources within the organization.
3. Consistent messaging to organization via executive leadership that the organization includes testing and learning as standard operating procedure.
4. Align defined resources and tools to daily site operations, business goals, and roadmap.
5. Create a testing plan that aligns to areas and resources defined.
6. Execute tests. Use outcomes to inform other testing practices.
7. Consistently provide readouts on test results to the organization.

CAMPAIGN PLANNING

Work across departments to define and align on campaign and promotion strategy.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. [Learn More](#)

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	Our ecommerce team creates their own plan.
Recommended Maturity Level	4 (Optimized)	Campaign planning follows an integrated plan across some key departments.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Align on company business goals and key performance indicators.

2. Maintain a consistent experience by planning campaigns across all channels.

SITE RECOMMENDATIONS

Place personalized product recommendations throughout the customer experience to drive conversion and higher per-unit transaction and average order value.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We manually place recommendations on the product description page, during checkout, and on the home page.
Recommended Maturity Level	4 (Optimized)	We use an intelligent recommendation engine and test it at a few key points along the shopper journey.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Define business goals for your recommendation strategy.

2. Build out locations to deploy recommendations, such as product description page, cart, category, order status.

3. Perform A/B testing to ensure that you find the right strategy for each location.

4. Deploy and monitor. Periodically perform A/B testing to ensure that strategies continue to perform.

SEARCH ENGINE OPTIMIZATION

Inform content strategy and marketing strategy by finding and analyzing search terms customers enter into search engines.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	We make effective use of keyword analysis in about half of relevant cases. Opportunities for optimization exist.

Type	Level	Description
Recommended Maturity Level	4 (Optimized)	We make effective use of keyword analysis for all relevant cases. Our keyword usage is highly optimized.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Engage in research to identify terms and words that drive the most traffic and revenue to the site.

2. Create a strategy to optimize those keywords.

3. Ensure keywords direct users to relevant areas of the site.

4. Test and monitor keyword performance. Continuously update and optimize keywords to meet key performance indicators.

SEARCH ENGINE MARKETING OPTIMIZATION

Manage and optimize paid search engine marketing keywords and phrases to gain visibility in search engine results.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	We make effective use of search engine marketing keywords in about half of relevant cases. Opportunities for optimization exist.
Recommended Maturity Level	4 (Optimized)	We make effective use of search engine marketing keywords for all relevant cases. Our keyword usage is highly optimized.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Engage in research to identify terms and words that drive the most traffic and revenue to the site.

2. Create a strategy to optimize those keywords.

3. Ensure keywords direct users to relevant areas of the site.

4. Test and monitor keyword performance. Continuously update and optimize keywords to meet key performance indicators.

CUSTOMER SEGMENTATION

Divide shoppers and prospects into logical segments to inform customer experience strategy.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	We have minimal data to segment existing customers.

Type	Level	Description
Recommended Maturity Level	4 (Optimized)	We have robust data for existing customers and limited data for prospects.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Identify research and analytics that inform customer and prospect behavior.

2. Define logical segments and strategies for conversion.

3. Define key performance indicators and goals for those customer segments.

4. Deploy customer segments and test to ensure they are meeting goals. Pivot as needed.

Deliver Seamless Digital Service

Improve the customer service experience by offering quick and convenient access to the information and data needed to complete a task or resolve an issue.

Meeting the demands of today's digitally connected customer is the #1 challenge for Service buyers (Salesforce, State of Service, 2019). When customers engage with a company, whether contacting customer support or simply tracking the status of a claim or order, they expect these experiences to be seamless no matter the channel. Every company can benefit from a better digital customer service experience.

Recommended Products

These products can help you deliver seamless digital service.

- Experience Cloud
- Marketing Cloud
- B2C Commerce
- Service Cloud
- Customer 360 Data Manager

Solutions

Get quick time to value by selecting Salesforce recommended solutions that you can implement immediately, while putting together a roadmap to build out more mature capabilities over time. To help you find solutions that your business is ready for right now, resources are divided into three levels depending on complexity.

Beginning

- Set up and Manage Cases
- Enhance Service Agent Productivity
- Create and Manage a Knowledge Base for Agents
- Turn Customer Emails into Cases
- Let Customers Submit Cases on the Web
- Get Real-Time Visibility into Customer Service with Dashboards Webinar

- Create Self Service Communities for Consumers
- Listen to the Social Web
- Get Started: Service Cloud: Agent Productivity Features
- Get Started: Service Cloud: Chat for Lightning
- Get Started: Service Cloud: Lightning
- Enhance Customer Service with Salesforce Call Centers
- Get Real-Time Visibility into Customer Service with Dashboards
- Design Dashboards: Service Cloud

Intermediate

- Enhance Customer Service with Salesforce Call Centers
- Self-Service Order Status on Web Site
- Order on Behalf of a Customer Solution Kit
- Engage Customers with Conversational Commerce via Live Chat Solution Kit
- Conversational Campaigns for SMS Solution Kit
- Conversational Campaigns for WhatsApp Solution Kit
- Expand Service Cloud with Digital Engagement
- See Social Listening for Customer Cases
- Build Your Customer Service Management Toolkit
- Get Started: Service Cloud Einstein
- Get Started: Service Cloud: Einstein Bots
- Automate Work Distribution With Omni-Channel: Service Cloud
- Automate Your Case Management: Service Cloud
- Deploy Messaging: Service Cloud
- Set up Communities for Self Service with Salesforce Identity
- Simplify Authentication for Communities
- Secure Profile with Multi-Factor Authentication

Advanced

- Engage Customers with Conversational Commerce via Chatbots Solution Kit
- Provide Product Recommendations via Service Agent (contact your Salesforce account team)
- Implement Virtual Personal Shopping Service with the Schedule an Appointment Solution Kit
- Offer Buy Online, Pick Up in Store (BOPIS) Solution Kit

Contact your Success Manager or Account Executive for more information.

Business Capabilities

Your organization's implementation of a capability can range from undeveloped to industry-leading. For each capability, we list best practices that you can use to grow your maturity and provide information on solution implementation.

Marketing Capabilities to Deliver Seamless Digital Service
Give customers the power to manage their marketing preferences.

Service Capabilities to Deliver Seamless Digital Service

Enhance your case and knowledge management capabilities to provide top-tier service and experiences.

Commerce Capabilities to Deliver Seamless Digital Service

Engage with customers where and when they need help with a transaction.

SEE ALSO:

Understand Business Capability Maturity Levels

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Engage Shoppers on Every Channel

Create Amazing Customer Experiences

Marketing Capabilities to Deliver Seamless Digital Service

Give customers the power to manage their marketing preferences.

PREFERENCE MANAGEMENT

Enable customers to convey and manage their communication preferences including for content, language, channels, and basic privacy such as opt-outs. Use AI to infer preferences.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	Customers are able to select preferences, but can't easily update.
Recommended Maturity Level	3 (Practicing)	Customers are able to select and update communication and privacy preferences easily.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Make it easy for customers to state and change their content, language, and channel preferences.

2. Make it clear to customers how to manage basic privacy considerations such as opt-ins.

3. Use AI to infer preferences.

4. Streamline preference management across touchpoints by incorporating preference management into your identity system.

Service Capabilities to Deliver Seamless Digital Service

Enhance your case and knowledge management capabilities to provide top-tier service and experiences.

CASE MANAGEMENT APPROACH

Manage a service request from initiation through resolution, including routing and assignment, ownership, traceability, and related interactions.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	Cases are generated automatically through common, basic channels such as web-to-case. Cases are worked primarily in siloes and on a first come, first served basis.
Recommended Maturity Level	3 (Practicing)	Cases are worked through one cohesive system that intakes cases, routes them into queues, and enables full case lifecycle tracking.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

- Define an overall support strategy and process.
- Define initial personas required. Include Service Agent, Service Team Manager, and Service Leader personas, and others as needed.
- Ensure the case management system accounts for each persona, and that each persona's Salesforce experience is customized for their needs.
- Align business and IT around the case routing process.
- Define case record types.
- Create & define queue priority.
- Set up email-to-case and web-to-case.
- Verify accurate handling by categorizing and triaging service requests early.
- Create and adopt business rules across the organization for each stage of the case life cycle.
- Use reports and dashboards to measure productivity and customer satisfaction against key progress indicators.

CASE EXPERIENCE DESIGN

Provide seamless experiences that allow agents and customers to quickly understand, track, and resolve issues.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	Our case design architecture is based on limited input. We involve agents in user experience design on an ad hoc basis, and build systems based on end-user feedback.
Recommended Maturity Level	3 (Practicing)	We use design team expertise to balance the needs of business and end users. Fields are sorted and grouped to maximize

Type	Level	Description
		efficiency. Multiple case page layouts are available for each case record type or user persona.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

- Track customers' assets, orders, support history, and other relevant information.
- Get a complete view of each customer by connecting data across departments and back-end systems.
- Design processes with a point-and-click interface that lets you orchestrate workflows, create and update records, log calls, send emails, and handle other important tasks.
- To help service reps solve customer issues faster, configure cast feed, actions, and sidebar list views.

CASE ROUTING AND ASSIGNMENT

Assign ownership of service requests based on type of request, relevant agent skills, availability, and equitable distribution based on agent performance goals.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	Requests are routed to agents or queues based on interactive voice response selection.
Recommended Maturity Level	3 (Practicing)	Requests are routed to agents based on their relevant skills. The routing system accounts for agent availability and current workload.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

- Align business and IT to the case routing process.
- Define case record types.
- Define support processes.
- Create and define queue priority.
- Set up email-to-case and web-to-case.
- Categorize and triage service requests early for accurate handling.
- Escalate request resolution based on priority and service level agreement expectations.
- Automatically relate multi-channel correspondence and resolution notes to the case lifecycle providing productivity gains.
- Use assignment rules to automate service request assignment.
- Use omni-channel routing to automatically match cases to the agent with the best skill set to solve them.
- Allow higher maturity customers to route service requests directly to agents based on relevant expertise and availability.

NOTIFICATIONS

Ensure that customers are notified of key milestones related to their service request.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	Notifications are not automated. Agents copy and paste notifications from a defined list.
Recommended Maturity Level	4 (Optimized)	Automated notifications about request status are triggered at key milestones and regular intervals based on customer journey.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

- Define business rules about what notifications to send, when to send them, and by what channel.
- If possible, prioritize by customer preferences.
- Set up macros to allow service agents to respond to customers quickly and in a structured way.
- Implement automatic emails or social notifications using macros or configured workflow rules. Create email templates for case open, case close, and case escalation situations.

RECOMMEND KNOWLEDGE

Resolve cases more quickly by surfacing recommended knowledge articles based on key service request characteristics.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	Our agents search articles manually. They can choose between several recommendations.
Recommended Maturity Level	4 (Optimized)	Articles are recommended to agents. Our agents can sort articles by recommendation rating.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

- Enable suggested articles so that when a new case is saved, the search engine automatically looks for articles that have keywords in common with the admin-selected case fields.

SERVICE REQUEST STATUS

Ensure your customers are notified of key milestones, as defined by the business, to their service request. Should lead to reduction in follow-up by customers that have service requests open.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	We email customers status updates for their service request when relevant. Customers have to contact our customer service organization to find out the up-to-date status of their request.
Recommended Maturity Level	4 (Optimized)	We have automated our workflows and update the case status automatically. We communicate with customers using their preferred channel.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

- Define business rules about what notifications should be sent, when, and by what channel. For example, at certain milestones or status changes.
- Prioritize by customer preferences if that capability exists.
- Provide the ability to automatically or manually send emails or social notifications to customers using macros or configured workflow rules.
- Create email templates for case open, case close, and a case that has been escalated.

UNIFIED AGENT EXPERIENCE APPROACH

Improve customer satisfaction by making the agent-customer interaction seamless. Deliver proactive, contextual information in a unified way that empowers agents and reduces effort.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	We collect end user feedback. We've established a strategy for creating a unified, intuitive experience for service agents.
Recommended Maturity Level	4 (Optimized)	Our service agents work cases through one connected process and use other systems only when necessary.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

- Seamlessly Integrate support channels.
- Provide better context, smoother interactions, and reduce repetitions by providing an integrated interface.
- Provide agents with relevant customer context needed to provide best service.
- Equip agents with tools for effective collaboration with other teams, such as case swarming ability.
- Empower agents to gather and build on collective knowledge to improve their knowledge base and self-service outcomes.

- .Employ skills-based routing of cases to match customer requests with agents with the most suitable skills.
- Use support data and customer analytics to measure and improve the entire customer experience.

NEXT BEST ACTION

Provide proactive recommendations to service agents on what to do next based on customer and industry data and built-in business logic.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	Service agents use their best judgment and some automated recommendations
Recommended Maturity Level	4 (Optimized)	We have defined business rules to recommend the next best action to service agents as they work a service request.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

- Develop a strategy to refine recommendations using business logic.
- Distill recommendations into a few key suggestions, such as a recommending repair, discount, or add-on service.
- Display the final recommendations in your Lightning app or community.
- Add the Actions & Recommendations Lightning component to Lightning Service Console or other case record page layouts.
- Include use cases such as sending an offer to a customer with a high attrition risk or sending customer inspections notices.

CROSS-SELL/UPSELL APPROACH

Provide agents or customers the ability to add or upgrade products and services during the service experience.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	Agents are trained on selling and sales are part of agent scripts. Product information and customer case information are in a single system.
Recommended Maturity Level	4 (Optimized)	Agents are trained on selling and sales are part of agent scripts. Product information and customer case information are in a single system.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

- Agents recommend certain products and solutions that integrate with each other and solve multiple customer challenges at the same time.
- Provide service agents with incentives or other mechanisms that encourage customers to try out new products or services.
- Gather information about upcoming windows of opportunity.
- Help customers proactively, not just reactively.
- Use AI within the service console for product recommendations based on the customer's purchase history.

KNOWLEDGE MANAGEMENT APPROACH

Capture and distribute reusable, relevant, and accurate knowledge content across one or more channels internally and externally to customers and partners.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	Our processes for collecting, organizing, and sharing knowledge are standardized. We focus on enabling service agents needs, developing a knowledge base, and on meeting customer and agent information needs.
Recommended Maturity Level	4 (Optimized)	Our knowledge management efforts align with the organization's business objectives. Our efforts focus on applying knowledge assets across the organization and with customers.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

- Define an overall knowledge management vision and the requirements for achieving it. Understand who uses it, where they use it, and what it is used for.
- Define initial personas required. Minimum necessary personas include creators, approvers, and consumers.
- Account for all personas when implementing capabilities and sub-capabilities.

SELF-SERVICE KNOWLEDGE BASE

Help customers resolve issues quickly by surfacing recommended knowledge articles based on key service request characteristics.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	Knowledge base is standard and consistent externally and internally. Customer feedback is recorded to help curate knowledge articles for self-service purposes.
Recommended Maturity Level	4 (Optimized)	New articles are continually being created and pushed out to a self service knowledge catalog.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Enable suggested articles so that when a new case is saved, the search engine automatically looks for articles that have keywords in common with the admin-selected case fields.

Commerce Capabilities to Deliver Seamless Digital Service

Engage with customers where and when they need help with a transaction.

CHAT CHANNEL

Allow customers to communicate with you via chat on your online storefront or app.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	We have a bot that answers simple questions and then pivots to a phone or email channel for more complex requests.
Recommended Maturity Level	3 (Practicing)	We have chat capabilities only during business hours of one time zone.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Train the etam with chat protocol practices.

2. Track customer themes and use that to inform on site FAQ's and inform business processes.

3. Enable screen reader support.

4. Always provide a way for a customer to pivot to a live person.

CUSTOMER SELF-SERVICE

Customer service information that clearly calls out return, shipping, privacy policies.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	1 (Minimal)	We have a privacy policy and terms of service.
Recommended Maturity Level	4 (Optimzied)	We link to customer service content from mutliple areas of the site and review it throughout the year.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Inform customer service content needs with information gathered from call center and chat interactions.

2. Use analytics to understand which pages are more frequently used. Frequently review those pages for maintenance and updates.

3. Ensure that shipping and delivery timeframes are clear.

PROACTIVE CHAT

Reach out to customers while they browse your site or app.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	We have a chatbot that sits on the cart and certain pages that automatically triggers after a pre-determined amount of time.
Recommended Maturity Level	4 (Optimized)	We deployed and tested proactive chat with live reps on more than half our pages.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Use insights from chats and calls to customer service to identify key areas to deploy proactive chat.

2. Define key performance indicators and goals for deployment such as driving down calls or abandonments.

3. Write scripts for proactive chat and define when and where to place it.

4. Test to ensure key performance indicators and goals are being met. If not, pivot and try something new.

SELF-SERVICE RETURNS

Allow customers to find help and initiate returns.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	Returns are clearly mentioned in the global footer so customers can find information.
Recommended Maturity Level	4 (Optimized)	Our customers can initiate a return by calling our toll-free number, using a chat feature, or at our physical store. We're researching allowing customers to initiate returns on our site.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Provide step-by-step instructions for navigating the return process.

2. Post links to the self-service area in the global site footer and other locations.

3. Measure and monitor customer access and questions to continuously improve.

4. Gather data on why a product is being returned in order to pass it back to other departments for overall quality improvement.

CART TAKEOVER

Save a sale by allowing a customer service representative take over a customer's cart during a call or chat.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We start a new cart to assist customers with completing orders.
Recommended Maturity Level	5 (Leadging)	We can take over a cart via an id displayed in the cart to answer questions and complete orders.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Display a toll-free customer service number clearly in the shopping cart.

2. Include the cart ID in contextual, on-hover help information.

3. Measure and monitor customer engagement to continuously improve experience.

SOCIAL CHANNEL SERVICE

Define service level agreements and response times for contact on social channels including FaceBook, Twitter, Instagram, and WhatsApp.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We have a few social channels that our site operations team reviews when they have time.
Recommended Maturity Level	5 (Leadging)	We have defined a service level agreement, responses, and an escalation path. Team members who monitor our channels are empowered to help customers resolve issues.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Analyze customers and prospects to determine preferred social channels.

2. Ensure consistency across workforce and social channels by creating a playbook of standard responses and service level agreements.

3. Measure and monitor engagement to continuously improve experience.

Create Amazing Customer Experiences

Deliver engaging apps in any language tied to your CRM and other systems.

Customers expect engagements with your company to be consistent across all channels. Meet consumers' expectations by building optimized ecommerce experiences that let your shoppers access all their data using a single identity and find products applicable to them.

Recommended Products

These products can help you deliver engaging customer experiences.

- Experience Cloud
- B2C Commerce
- Heroku
- Mulesoft

Solutions

Get quick time to value by selecting Salesforce recommended solutions that you can implement immediately, while putting together a roadmap to build out more mature capabilities over time. To help you find solutions that your business is ready for right now, resources are divided into three levels depending on complexity.

Beginning

- Create Self Service Communities for Consumers
- Follow eCommerce UX/UI Best Practices
- Optimize Site Search to Increase Conversion Rate

Intermediate

- Develop for Salesforce B2C Commerce
- Expand Your Reach with Communities
- Create Custom Mobile Apps for Shoppers (contact your Salesforce account team)
- Implement Seamless Cross-Cloud Identity
- See Customer 360 Data Manager Fundamentals
- See Customer 360 Data Manager Basics
- Export Customer 360 Data Manager's Global Profile to Inform Your Systems of Record
- See Data Stewardship with Customer 360 Data Manager Data Validation Dashboards
- Integrate Salesforce and Google Platforms
- Set Up Marketing Cloud Connection
- Set Up Sales and Service Cloud Connection

Advanced

- Use Clienteling Apps (contact your Salesforce account team)

Contact your Success Manager or Account Executive for more information.

Business Capabilities

Your organization's implementation of a capability can range from undeveloped to industry-leading. For each capability, we list best practices that you can use to grow your maturity and provide information on solution implementation.

Marketing Capabilities to Create Amazing Customer Experiences

Optimize your customers' experiences with intentional and relevant brand interactions.

Commerce Capabilities to Create Amazing Customer Experiences

Engage customers with smooth, well-designed ecommerce interaction.

SEE ALSO:

Understand Business Capability Maturity Levels

Business Scenarios for Retail

Data-Driven Advertising

Customer-Centric Journeys

Engage Shoppers on Every Channel

Deliver Seamless Digital Service

Marketing Capabilities to Create Amazing Customer Experiences

Optimize your customers' experiences with intentional and relevant brand interactions.

EXPERIENCE DESIGN

The process of shaping brand interactions based on an understanding of user behavior and expectations. Apply experience design principles to every marketing interaction, message, and touchpoint.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	Our user experience guidelines exist but they're often considered after technological and architectural goals.
Recommended Maturity Level	4 (Optimized)	Regular testing and experimentation are integrated into our development cycle. We maintain a backlog of customer-centric features that are prioritized by end-user research and data collection findings.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Conduct user-focused design research.
2. Define user goals in customer-centric language.
   - Use empathy to better understand users.

- Use human language, not system or tech-centric language.

3. Take into account the user's context. For example, what location is the customer in? Are they on the go, at their desk, using a kiosk, or using a mobile device.

4. Gather feedback in a non-intrusive manner.

5. Document and share findings from user-focused design research with all business users, partners, and stakeholders.

6. Formulate, socialize, distribute, and conduct enablement on experience design principles and guidelines specific to your brand.

7. Ensure marketing campaigns, journeys, messages, and interactions reflect experience design principles.

8. Build in feedback loops that enable users, employees, and partners to comment on experiences.

9. Revisit user-focused design. Research and update experience design principles and guidelines.

CONTENT LOCALIZATION

Provide content in the languages that are relevant to customers based on their preferences. Manage language versions of content effectively.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We translate the majority of our content into the highest priority languages and make a few modifications to reflect local cultures for top markets.
Recommended Maturity Level	4 (Optimized)	We translate almost all content into the highest priority languages and make several modifications to reflect local cultures in almost all markets.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Integrate teams at the organizational level. Eliminate content silos in which multiple teams work on the same content with separate workflows.

2. Assess the value of markets: which markets served are showing the strongest sales or highest potential for revenue.

3. Determine which markets and content are "locality-critical". Not all foreign markets require localization.

4. Determine how to balance resource allocation for translation versus localization processes.

Commerce Capabilities to Create Amazing Customer Experiences

Engage customers with smooth, well-designed ecommerce interaction.

MOBILE-FIRST DESIGN METHODOLOGY

All experiences include and incorporate mobile-first methodology.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	3 (Practicing)	We create separate desktop and mobile experiences for our site.
Recommended Maturity Level	5 (Leading)	Our roadmap and site maintenance practices are all viewed through the lens of a mobile-first strategy.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Ensure the site and creative teams are fully trained on mobile-first design practices.

2. Create playbook or site guide documents. Evolve these documents based on best practices for following mobile-first design principles in all areas of the site.

SITE SPEED PERFORMANCE

Ensure site speed performance is benchmarked and maintained by following specific practices.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	We take a look when someone complains or we notice something internally.
Recommended Maturity Level	4 (Optimized)	Once a year before a large event we analyze site speed and make changes as needed before the event.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Establish goal key performance indicators for page weight, image sizes, tagging protocols, etc.

2. Create a site playbook and train all users with roles on the site in best practices.

3. Identify front-end speed testing tools and set up regular cadence of site speed checks.

4. Review findings and implement feedback in the sprint cycle. Retrain others as needed based on outputs.

5. Gather customer feedback from all channels as it relates to site speed and research.

TEST & LEARN

Leverage A/B and other testing to measure and improve your customer-centric site management efforts.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	We perform ad-hoc testing for specific efforts.
Recommended Maturity Level	3 (Practicing)	We perform ad-hoc testing of several marketing efforts each year.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Identify third-party tools using your business goals and needs as a driver.

2. Implement, train, and give ownership to key resources within the organization.

3. Consistent messaging to organization via executive leadership that the organization includes testing and learning as standard operating procedure.

4. Align defined resources and tools to daily site operations, business goals, and roadmap.

5. Create a testing plan that aligns to areas and resources defined.

6. Execute tests. Use outcomes to inform other testing practices.

7. Consistently provide readouts on test results to the organization.

CREATE NEW USER INTERFACES

Work with experience designers to build front-end shopper experiences.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	1 (Minimal)	The capability doesn't exist in our current organization.
Recommended Maturity Level	5 (Leading)	We have a dedicated front-end resource who works with the product manager.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Define a workflow process to define and support the creation of new user interfaces.

2. To help everyone understand the scope of potential changes, consider defining levels of effort. For example, use a t-shirt size system where level of effort is defined as small, medium, large, or extra large.

3. Benchmark and measure each improvement to determine and identify return on investment.

CONTENT CREATION

The ability to write editorial content for online channels as well as search engine optimization.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	We have an editorial team that refreshes editorials frequently.
Recommended Maturity Level	4 (Optimized)	Our editorial team continuously optimizes its content and conducts takeaways after launch.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Train your team on best practices for online copywriting.

2. Create a playbook to measure and monitor content.

3. Develop a content plan that clarifies the purpose and success metrics for each piece of content.

CAMPAIGN PLANNING

Work across departments to define and align on campaign and promotion strategy.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	Our ecommerce team creates their own plan.
Recommended Maturity Level	4 (Optimized)	Campaign planning follows an integrated plan across some key departments.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Align on company business goals and key performance indicators.

2. Maintain a consistent experience by planning campaigns across all channels.

Digitize the Store Experience

Rapidly respond to customers and employees in the new normal of the digital retail store experience.

Strengthen your customer relationships by offering safe and convenient shopping experiences to shoppers. Today's customers expect stores to offer appointment booking, easy communication with associates, smooth curbside pickup, and helpful order status information. Digital solutions help customers engage in safe shopping in the present, but will continue as customers form new shopping habits.

Safeguard company health and wellbeing by taking steps to protect your employees. Work.com solutions help you review workplace readiness and keep employees, customers, partners, and communities safe and informed during the COVID-19 crisis and beyond.

Recommended Products

These products can help you engage shoppers on every channel.

- Marketing Cloud

- B2C Commerce
- Service Cloud
- Experience Cloud

Solutions

Get quick time to value by selecting Salesforce recommended solutions that you can implement immediately, while putting together a roadmap to build out more mature capabilities over time. To help you find solutions that your business is ready for right now, resources are divided into three levels depending on complexity.

Beginning

- Learn About Work.com Basics
- Communicate Store Changes Solution Kit
- Schedule an Appointment Solution Kit
- Integrate Your Facebook Product Data Feed
- Plan Your Reopening with Work.com (contact your Salesforce account team)

Intermediate

- Schedule an Appointment Solution Kit
- Learn About Reopening with Work.com
- Discover Work.com Solutions
- Implement Quick Start Commerce for Consumer and Essential Goods (contact your Salesforce account team)
- Implement Quick Start Commerce for Grocery and Food Service (contact your Salesforce account team)
- Implement Quick Start Commerce Curbside Pickup (contact your Salesforce account team)
- Facilitate Curbside Pickup Solution Kit
- Implement Quick Start Commerce for Channels (contact your Salesforce account team)
- See the Salesforce Care Employees and Customers Quick Start Guide

Advanced

- Implement virtual personal shopping service with Schedule an Appointment Solution Kit
- Protect Your Workforce with Contact Tracing Solutions
- Offer Buy Online, Pick Up in Store (BOPIS) Solution Kit

Contact your Success Manager or Account Executive for more information.

Marketing Capabilities

Enhance efforts to generate leads and target marketing.

Service Capabilities

Offer safe and easy communication channels to customers.

Marketing Capabilities

Enhance efforts to generate leads and target marketing.

LEAD GENERATION

Develop product, promotion, value proposition content, and messages to support lead generation efforts.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	1 (Minimal)	High-level messaging is available, but provides limited value for lead conversion or deal progression.
Recommended Maturity Level	2 (Emerging)	Available content provides good value and impact but it is not well organized or easily accessible.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Create and groom a lead generation content backlog in partnership with sales.
2. Prioritize with input from Sales and Analytics teams.
3. Involve an experience designer to ensure that content resonates with key audiences.
4. Use an Agile content development approach.
5. Ensure that final content is uploaded, maintained, and updated regularly in the appropriate Content Management System.

DIRECT MARKETING

Use owned and operated channels and platforms, including direct mail, email, events, mobile apps, social platforms, and websites) to deliver highly coordinated, personalized marketing messages.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	We "batch and blast": everyone gets the same message.
Recommended Maturity Level	3 (Practicing)	Customers are divided into large groups and messages are different for each large group.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Evaluate each message at the customer level to determine go/no-go decisions.
2. Use messages to extend customer journeys based on engagement.
3. Personalize messages at the segment level using dynamic content, and at the subscriber level using personalization strings.
4. Use templates within Content Builder so that marketers can modify content without technical support.
5. Use media queries and responsive design to optimize mobile and desktop experience to drive higher engagement.
6. Use interactive email to drive engagement and conversion and collect more first party data.

PAID MARKETING

Use online and offline paid media channels to deliver personalized, coordinated marketing messages.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	2 (Emerging)	We make basic use of retargeting, with almost no optimization or coordination with owned or earned media.
Recommended Maturity Level	4 (Optimized)	We make advanced use of retargeting and new customer targeting via lookalikes. We use somewhat personalized messages, and do some coordination with owned and earned media.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Ensure that content is aligned with the channel and audience.

2. Create audience segments and lists using first party data.

3. Upload first party data into the ad platform.

4. Retarget existing customers to drive repeat purchases.

5. Apply the ad platform's native lookalike capabilities to acquire new customers.

6. Evolve to serving dynamic content.

Service Capabilities

Offer safe and easy communication channels to customers.

CHAT CHANNEL

Provide an engaging and personalized shopping experience by connecting customers with the right person for guidance and advice.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	1 (Minimal)	Customers can engage with agents in real time but this capability is limited to a small part of our service or product list.
Recommended Maturity Level	2 (Emerging)	Customers complete a web form which helps agents understand the context of the request. Chat capabilities are deployed across multiple products or services. Key performance indicators have been defined for this channel.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Identify priority chat channels, and locations and products to deploy chat.

2. Organize your content to align to the right channels.

3. Establish operations and strategic key performance indicators.

4. Enable chat.

5. Set up request routing.

6. Specify a location for chat.

7. Determine what records to link to chat.

8. Create an offline form option.

9. Deploy chat to relevant pages.

MESSAGING CHANNEL

Connect with your customers via messaging platforms such as SMS, Facebook Message, or WhatsApp.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	1 (Minimal)	We support just one messaging platform.
Recommended Maturity Level	2 (Emerging)	Our agents are trained to support multiple messaging channels. We have defined key performance indicators for every chat channel we support.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Identify priority chat channels, and locations and products to deploy messaging.

2. Organize your content to align to the right channels.

3. Establish operations and strategic key performance indicators.

4. Create and assign messaging permission sets.

5. Set up messaging channels.

6. Set up channels and routing.

7. Create auto-response messages and quick texts.

8. Test and deploy.

VIDEO CHAT CHANNEL

Engage face-to-face with your customers to provide a unique and personal experience on any device.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	1 (Minimal)	We've enabled video chat for one product or line of business.
Recommended Maturity Level	2 (Emerging)	We monitor video chats for quality and have key performance indicators defined for this channel.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Identify channels, locations, and products to prioritize for video chat.

2. Organize your content to align with the right channels.

3. Establish operations and strategic key performance indicators.

4. Set up video chat.

CHATBOTS

Enable chatbots to deflect the most frequent support requests and improve agent workload.

Capability Maturity

The minimum maturity level represents the most basic viable implementation. Learn More

Type	Level	Description
Minimum Maturity Level	1 (Minimal)	Chat is enabled. Basic conversation is available to customers for specific products or services.
Recommended Maturity Level	2 (Emerging)	Chatbots are enabled across most services and used to answer routine questions.

Best Practices

To increase your business maturity for the capability, implement the recommended best practices.

1. Identify the most frequent support requests.

2. Create chat and chatbot use cases.

3. Define routing requirements.

4. Establish clear success measures, for example, bot escalation rates.

5. Identify key stakeholders within service and marketing for testing and design.

6. Configure and deploy.

7. Script chatbot dialogues and assign chatbots to the designated channel.

Understand Business Capability Maturity Levels

To achieve success in each practice area, an organization must reach defined levels of maturity. We divide business capability maturity into five levels.

Level 1: Minimal
> The capability doesn't exist in the current organization or is practiced on an ad-hoc basis.

Level 2: Emerging
> The capability exists to a small degree, but isn't mature or developed.

Level 3: Practicing
> The capability is somewhat mature and delivers consistent value.

Level 4: Optimized
> The capability is mostly mature and continually improved.

Level 5: Leading
> The capability sets the industry standard and delivers significant value.

Determining your organization's level of business maturity helps determine your strategy for enhancing your capabilities in business scenarios.

SEE ALSO:

> Business Scenarios for Retail
>
> Business Scenarios for Discrete Manufacturing

Solution Architecture for Retail

Identify specific tools and resources that you need to deliver cross-cloud retail solutions for your business.

Solution architecture diagrams show you how recommended products interoperate with backend systems and how data is passed between them. Learn with Trailhead

B2C Solution Architecture with Key Salesforce Clouds
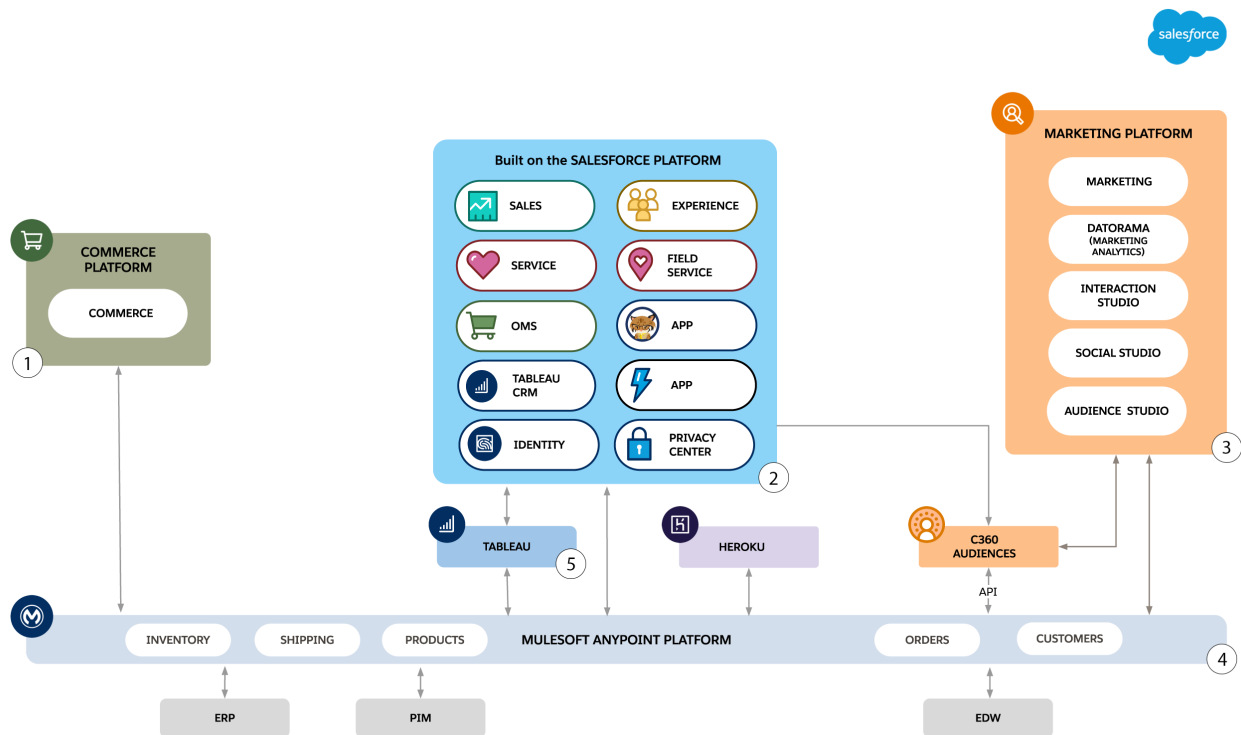
The Salesforce B2C architecture runs on three highly scalable platforms: Salesforce, Commerce, and Marketing.

- Commerce Platform (1) is a highly scalable B2C Commerce platform for web and mobile eCommerce.

- Products built on the Salesforce Platform (2), including Sales, Service, Communities, Order Management System, Force.com applications, CRM Analytics, Salesforce Customer Identity, and Customer 360 Privacy Manager, run on the same physical platform and share a common data model.

    - APIs enable integration with other Salesforce and non-Salesforce platforms.

    - The Salesforce Platform can be used for customer master and consent management, or it can integrate with a third-party Master Data Management system.

    - Order Management System (OMS) is a Commerce Cloud product, but it runs natively on the core Salesforce Platform.

    - CRM Analytics has direct connections to the Salesforce Platform and is best suited for Sales and Service analytics.

    - Customer Identity features SSO and authentication management to ensure employees, customers, and partners sign on safely across all of your applications and systems.

    - Customer 360 Privacy Center manages data retention, rights, and actively manages consent to ensure compliance with global and local privacy and consent rules.

    - Data Cloud unifies and segments your marketing data, and activates to any endpoint, across messaging advertising, and personalization.

- Marketing Platform (3) is a grouping of Marketing Automation products that includes:

    - Marketing Cloud enables personalization, journey orchestration, and cross channel messaging.

    - Datorama for deep marketing analytics.

    - Interaction Studio provides real-time interaction management, personalization, and AI driven recommendations.

- – Social Studio provides social monitoring and interaction.
- – Audience Studio is used to create complete profiles across first, second, and third-party data and to segment, and activate that data.

- MuleSoft Anypoint Platform (4) provides API management and system to system integration.

  - – Tableau provides business intelligence analytics.
  - – MuleSoft can integrate third-party systems such as Enterprise Resource Planning (ERP), Product Information Management (PIM), and Enterprise Data Warehouse (EDW) with Salesforce.

- Tableau (5) is a business intelligence platform and has direct connections to the rest of the Salesforce ecosystem.

Connectors enable the connectivity that allows cross-cloud actions required to support sophisticated use cases such as handling abandoned carts and personalized marketing recommendations.

B2C Solution Architecture with Salesforce Connectors
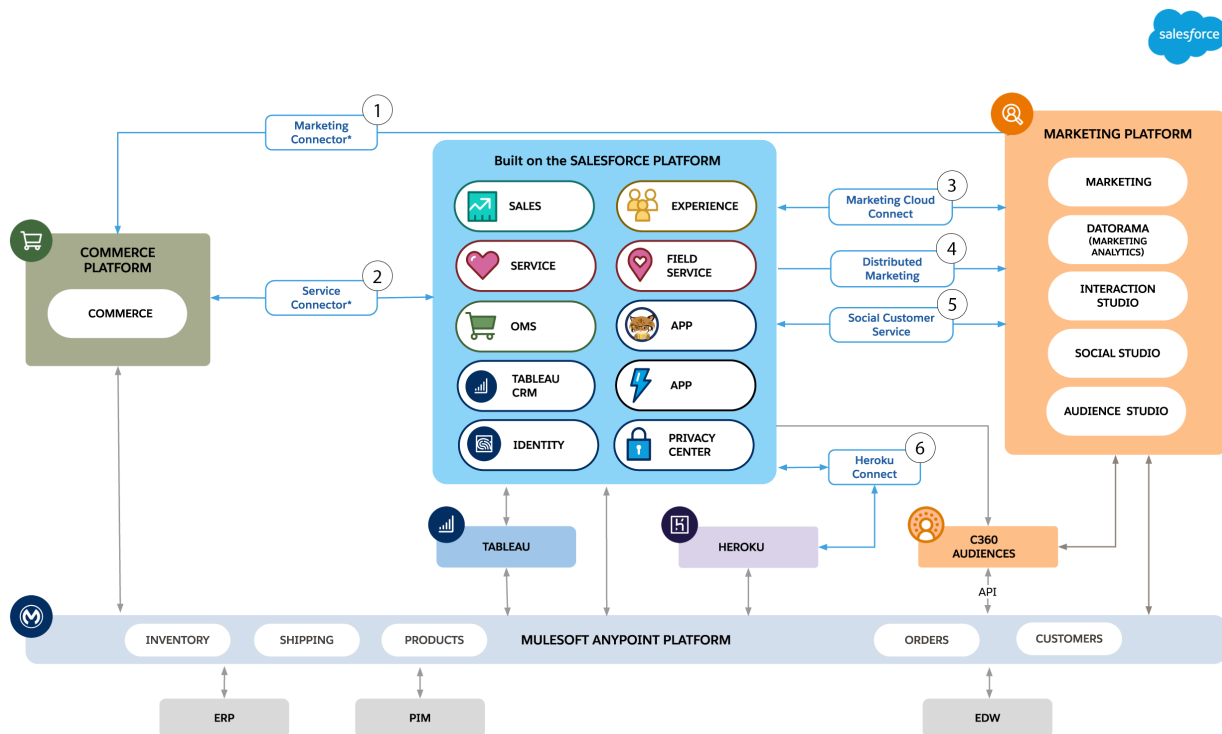
Connectors are point-to-point connections provided by Salesforce that allow customer experiences to cross Marketing, Service, and Commerce platform boundaries.

Marketing Connector (1) allows the Commerce platform to initiate actions in the Marketing platform.

- Track page views, searches, product views, cart contents, and order placement.
- Manage marketing opt-ins, email subscriptions, and preferences.
- Trigger transactional email, including account creation and update messages, password recovery, customer service messages, and order confirmation.
- Sync data such as product catalogs, customer information, order details, and promotional details.
- This connector is community code and provides a development framework for customers to follow.

Service Connector (2) connects Commerce Cloud to Service Cloud. Commerce products usually initiate actions, but service products can pull data from Commerce Cloud.

- Submit cases from a storefront for anonymous or registered customers.
- Retrieve case details for a registered storefront customer from Service Cloud.
- Sync profiles of registered customers and profile-specific addresses between Commerce and Service Clouds.
- Sync order data between Commerce and Service Clouds.
- This connector is community code and provides a development framework for customers to follow.

Marketing Cloud Connect (3) connects Marketing platform products with Sales and Service Cloud products. The connector allows data to sync between clouds. It also allows Marketing Cloud products to trigger events such as emails and journeys based on Sales and Service Cloud data.

- Automatically sync data from Sales or Service Cloud to Marketing Cloud.
- Connect Journey Builder to other clouds.
- Use Sales and Service Cloud data to construct email.
- Provide Marketing Cloud email tracking data such to Sales and Service Cloud products.

Distributed Marketing (4) allows users in Sales and Service Clouds to view, personalize, and send on-brand, best practice content through Marketing Cloud.

- Use data stored in contact, lead, or person account records to address emails.
- Craft email to a segment of customers based on a list view.
- Send email about a campaign to a group of customers based on a touchpoint cadence managed by Marketing Cloud.

Social Customer Service (5) turns social network posts into case or lead records.

Heroku Connect (6) syncs data between the Heroku app platform and the core platform.

- Create a data lake.
- Build, deploy, and monitor other highly scalable customer-facing mobile and web applications.

B2C Solution Architecture with Key Use Cases
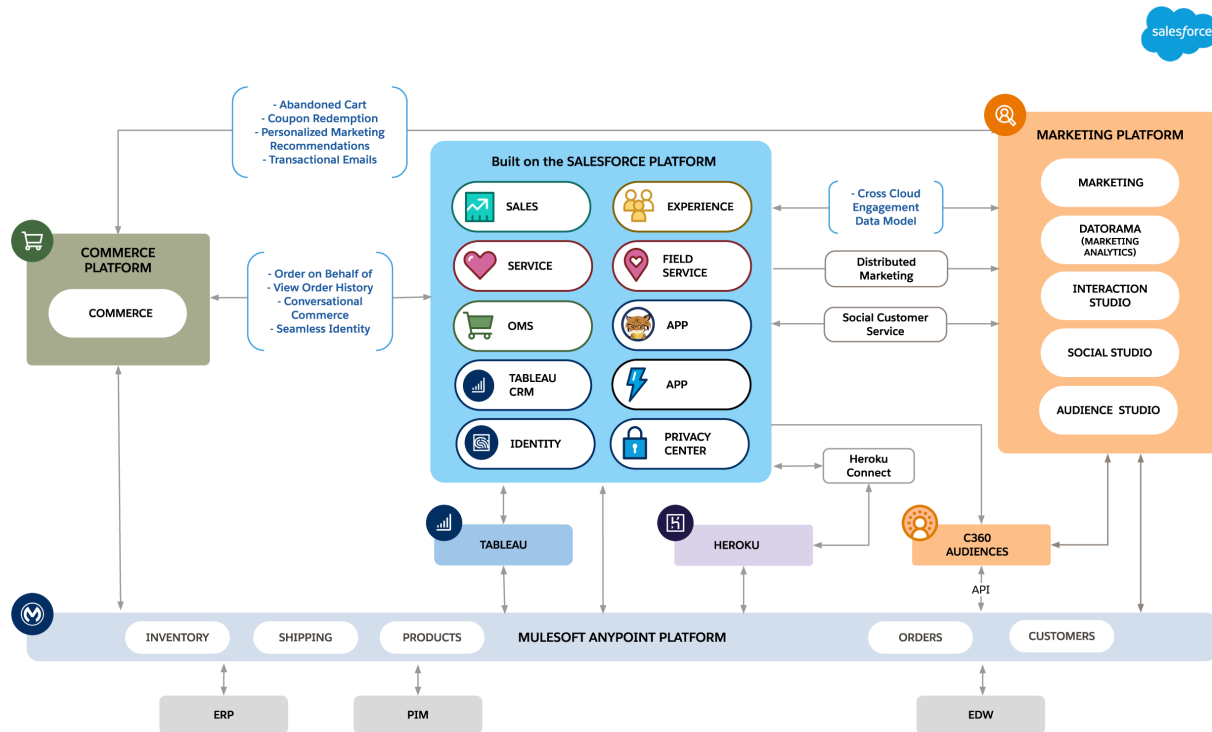
Various key use cases can be implemented through Connectors and APIs.

Use Cases Initiated from Core

- Explore Cross-Cloud Engagement Data Models
- Distributed Marketing
- Order on Behalf of a Customer

Use Cases Initiated from Commerce

- Turn Abandoned Carts into Completed Sales
- Redeem Coupons
- Personalize Marketing Recommendations
- Keep Customers in the Loop with Transactional Email
- View Order History and Cancel Orders
- Engage Customers with Conversational Commerce
- Implement Seamless Cross-Cloud Identity

Use Cases Initiated from Marketing

- Turn Social Media Posts in to Leads and Cases
- Run Conversational Campaigns with WhatsApp
- Run Conversational Campaigns with SMS

B2C Experience Solution Kits outline required products, connector considerations, and configurations to implement these key use cases.

SEE ALSO:

Salesforce Architectural Diagrams: Quick Look

Solution Kits for Retail and B2C

Business Scenarios for Retail

Solution Kits for Retail and B2C

Enhance your retail business by implementing one or more solution kits. Get product recommendations, workflow details, and instructions to help you implement the solution from start to finish.

Related Content

Explore system architecture related to this solution.

- Industry Blueprint for Retail
- Reference Architecture for Retail
- Solution Architecture for Retail

Take Trailhead modules related to this solution.

- Salesforce Solution Kits: Quick Look
- Customer 360 Guide for Retail: Quick Look
- Customer 360 Guides: Quick Look

Solution Kit	View in Salesforce Docs	Download Kit as a PDF
Turn Abandoned Carts into Completed Sales Connect with shoppers who add items to their carts but don't finish orders. Send personalized behavioral messages that encourage them to return and buy.	View Now	Download PDF
Redeem Coupons Offer targeted customer journeys and increase positive purchasing decisions. Increase completed purchases, personalize the experience, and track coupon usage.	View Now	Download PDF
Order on Behalf of a Customer Place orders on behalf of shoppers who need assistance because they can't access the Internet or find the products they want to purchase.	View Now	Download PDF
Personalize Marketing Recommendations	View Now	Download PDF

Solution Kit	View in Salesforce Docs	Download Kit as a PDF
Keep shoppers interested in your products using email recommendations based on merchandise that your customers already purchased from you.		
Keep Customers In the Loop with Transactional Email Inform customers on the status of their orders through email while reducing call volume to your service centers. Increase storefront visits.	View Now	Download PDF
Engage Customers with Conversational Commerce Provide richer customer service and drive sales when you implement live agent chat or chat bots within Commerce Cloud. Build brand loyalty, check order status, and offer extra assistance at the hands of service agents.	View Now	Download PDF
Implement Seamless Cross-Cloud Identity Unify customer data with a single identity for each customer across your ecommerce sites and your communities. Enable one identity and give the customer visibility through the entire product catalog.	View Now	Download PDF
Explore Cross-Cloud Engagement Data Models Improve customer loyalty by establishing a common profile for each customer across Marketing Cloud, Commerce Cloud, and Service Cloud. Determine the best system of record for each type of customer data to take advantage of out-of-the-box cloud integrations.	View Now	Download PDF
Run Conversational Campaigns for WhatsApp Link customers directly from marketing messages to a live WhatsApp chat with your agent or chatbot for any questions about the product promotion.	View Now	Download PDF
Run Conversational Campaigns for SMS Link customers directly from marketing messages to a live SMS chat with your agent or chatbot for any questions about the product promotion.	View Now	Download PDF
Communicate Store Changes Build trust with your customers by keeping them updated on your store policies, hours, and any changes to locations.	View Now	Download PDF
Schedule an Appointment Implement scalable processes to let shoppers schedule appointments to meet locally managed or customer-preferred social distancing preferences.	View Now	Download PDF
Facilitate Curbside Pickup Prepare for the customer's arrival, fulfill curbside orders, and complete fulfillment without logging in to multiple systems.	View Now	Download PDF

Solution Kit	View in Salesforce Docs	Download Kit as a PDF
Offer Buy Online, Pick Up in Store (BOPIS) Enable shoppers to buy products online for local store pickup through a Salesforce B2C Commerce storefront.	View Now	Download PDF

SEE ALSO:

Salesforce Solution Kits: Quick Look

Industry Blueprint for Retail

Reference Architecture for Retail

Solution Architecture for Retail

Business Scenarios for Retail

Turn Abandoned Carts into Completed Sales

Connect with shoppers who add items to their carts but don't finish orders. Send personalized behavioral messages that encourage them to return and complete a purchase.

Get Started

	Explore system architecture related to this solution. • B2C Industry Blueprint • B2C Reference Architecture • B2C Solution Architectures
	Take Trailhead modules related to this solution. • Salesforce Solution Kits: Quick Look • Customer 360 Guide for Retail: Quick Look • Customer 360 Guides: Quick Look

This solution kit helps you:

- Increase completed purchases.
- Drive gross merchandise volume (GMV).
- Give your shoppers a personalized experience when you connect Commerce Cloud and Marketing Cloud.

- Gain insights into what your shoppers want.
- Increase shopper engagement.

Required Products

- B2C Commerce Enterprise (SFRA or SiteGenesis)
- Marketing Cloud Enterprise 2.0
- Marketing Cloud Personalization Builder

Optional Products

- Interaction Studio

Implement This Solution

Abandoned Cart Solution Workflow

Learn how data flows through the configurations to turn abandoned carts into completed sales.

Design Considerations

Keep these design considerations in mind when you turn abandoned carts into completed sales.

Integration Reference Implementation

Integration reference implementations are developer enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns. Use the Marketing Cloud reference implementation for B2C Commerce to turn abandoned carts into completed sales.

Configurations

Use these configurations to turn abandoned carts into completed sales.

Abandoned Cart Solution Workflow

Learn how data flows through the configurations to turn abandoned carts into completed sales.

Workflow
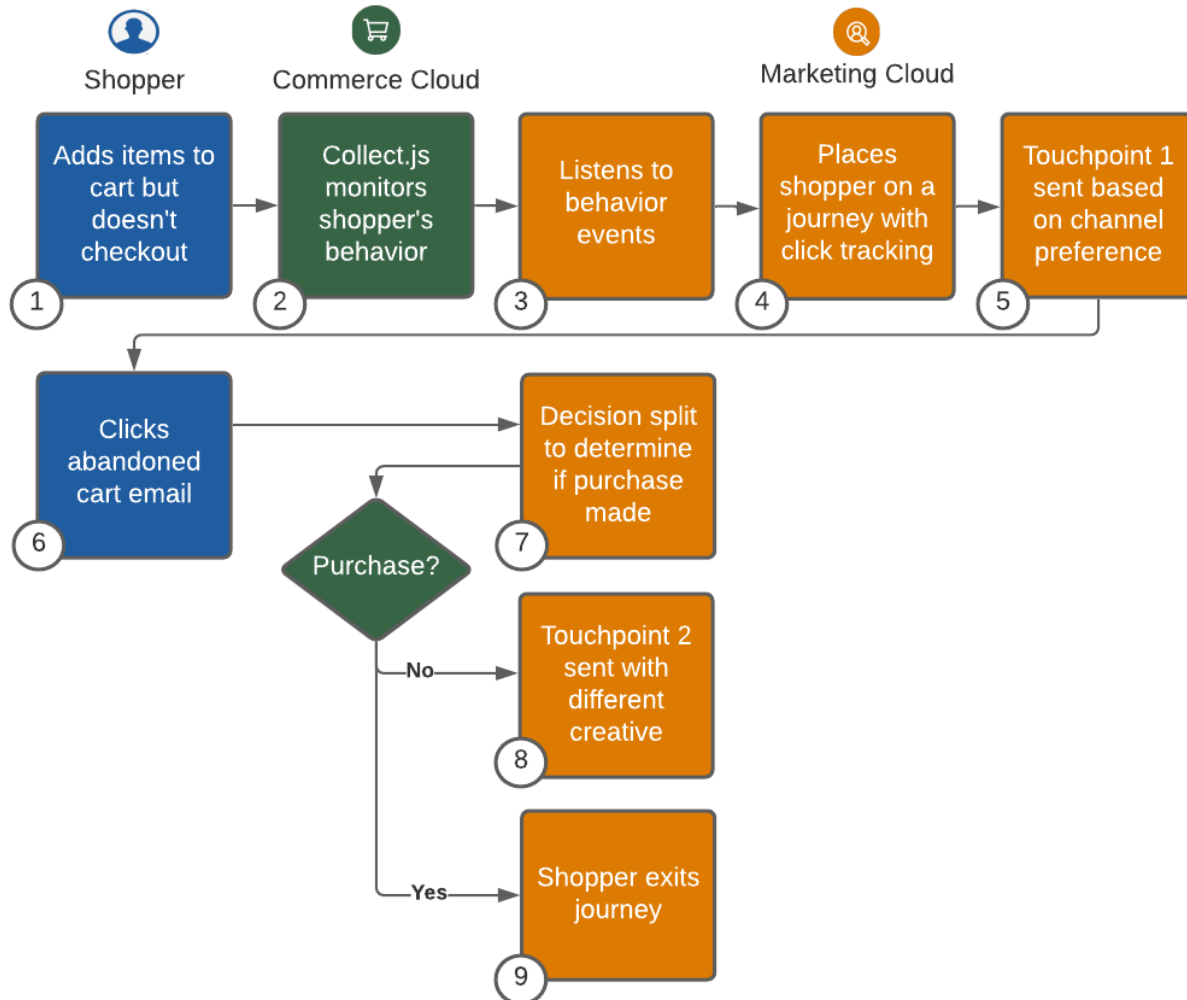
1. The shopper adds items to their cart, but doesn't check out.

2. The shopper's behavior is monitored via the collect.js code placed on the Commerce Cloud site and shared with Marketing Cloud.

3. Marketing Cloud listens to the shopper's behavior.

4. Marketing Cloud places the shopper on a journey.

5. Marketing Cloud sends Touchpoint 1 to the shopper using their preferred channel.

6. The shopper receives and opens an abandoned cart email.

7. To determine decision split, ensure click tracking is set up in email.

8. If they have not yet made a purchase, Marketing Cloud sends the shopper a different email with creative.

9. If the shopper has made a purchase, Marketing Cloud exits them from the Abandon Cart journey. The shopper is then eligible for post purchase communications.

Understand the Flow of Data

1. Collect the catalog, product, order, and customer data feeds from the B2C Commerce staging and production environments.

2. Move the data to the Marketing Cloud SFTP server and create Import Activities so that Marketing Cloud consumes it on a schedule via Automation Studio.

3. Use B2C Commerce data in Marketing Cloud via data extensions during the authoring of email templates, creation of journeys, and development of personalized product recommendations.

4. Extend the B2C Commerce storefront by replacing its email functions with the Marketing Cloud's trigger-send features. Implement framework customizations that trigger transactional emails for common storefront scenarios.

5. Implement and extend the Marketing Cloud collect.js through the storefront by using the reference implementation. This implementation lets Personalization Builder handle abandonment scenarios targeting browse and cart. To implement behavioral monitoring, ensure that Personalization Builder is licensed as part of Marketing Cloud. Detailed instructions are also provided during the Marketing Cloud Personalization Builder implementation process based on attributes selected to be tracked.

6. To drive behavioral messaging, personalization, and segmentation in Marketing Cloud, use the shopper behavioral data collected from collect.js.

Functionality Considerations

- License Personalization Builder as part of Marketing Cloud to use collect.js.
- The reference implementation enables email authoring via Marketing Cloud's Email Studio, rather than the developer storefront template model supported by B2C Commerce Enterprise.

- The reference implementation enables B2C Commerce to trigger and Marketing Cloud to generate transactional email delivery.

- The reference implementation supports delivery of B2C Commerce-driven data feeds to Marketing Cloud through SFTP using customers, catalogs, and orders.

- Use data feeds that Marketing Cloud consumes to shape email content, including storefront product recommendations.

- A collect.js storefront implementation can monitor storefront shopper behavior and trigger email content for abandoned browse and cart scenarios using Personalization Builder in Marketing Cloud.

- Extend the storefront to rebuild the customer's cart based on the cart definition from Marketing Cloud.

Performance Considerations

- Plan your Commerce Cloud data feed consumption to support your expected volume and Marketing Cloud use cases.

- Limit data imported via the connector feed framework to 1 million rows per import. If your data volume exceeds 1 million rows, consider multiple imports.

- Use data extensions to import data into Marketing Cloud for personalization or segmentation.

- Avoid importing data into Marketing Cloud for "pre-processing" or "data-lake" activities.

Alternative Solutions

Marketing Cloud Personalization

Learn how data flows through Marketing Cloud Personalization to turn abandoned carts into completed sales.

Workflow with Marketing Cloud Personalization (formerly Interaction Studio)
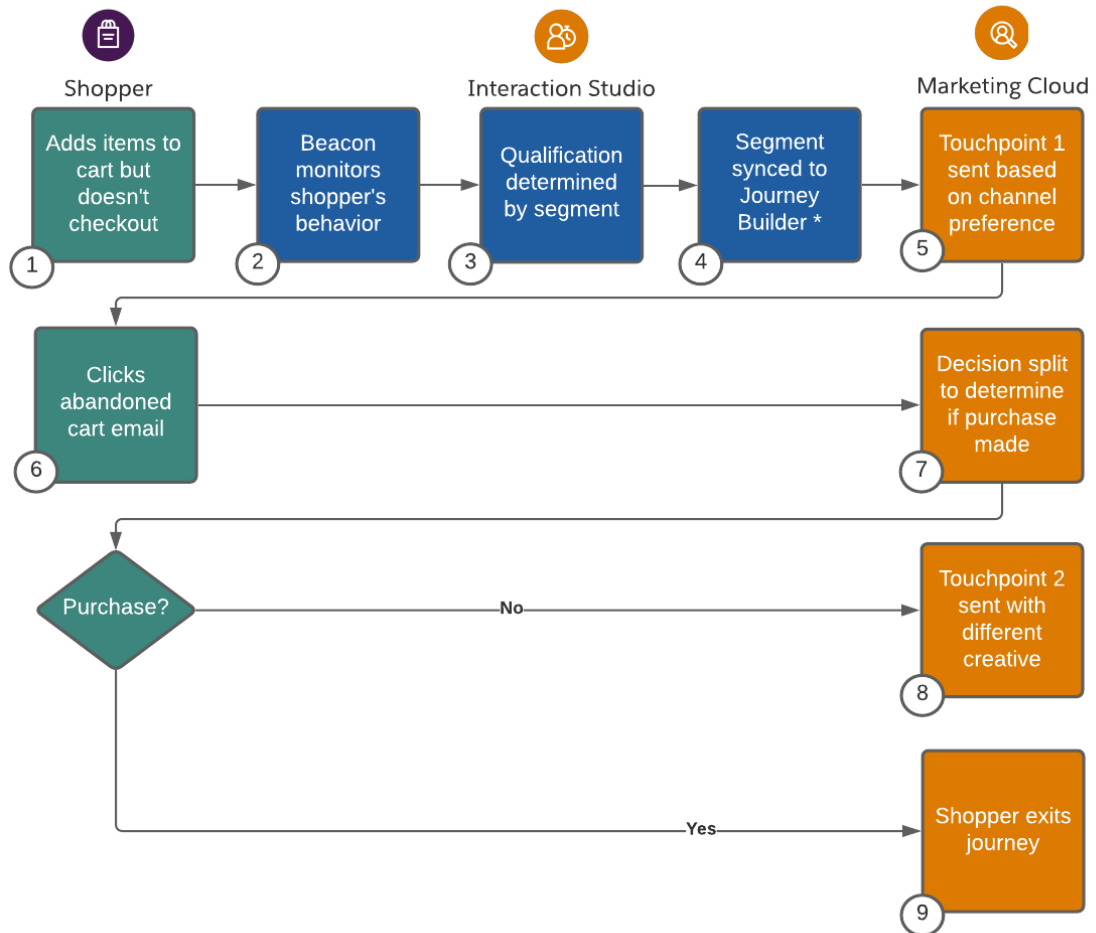
1. The shopper adds items to their cart, but doesn't check out.

2. Marketing Cloud Personalization monitors the shopper's behavior.

3. The Marketing Cloud Personalization segment determines qualification that shopper has abandoned their cart.

4. The Marketing Cloud Personalization segment is synced to Marketing Cloud or another email provider. Use order data in Marketing Cloud to ensure that no purchase was made before sending messages.

5. Marketing Cloud injects the Shopper in a journey and sends Touchpoint 1 to the shopper using their preferred channel.

6. The Shopper receives and opens an abandoned cart email.

7. Marketing Cloud uses existing order data in a decision split to determine if a purchase has been made.

8. If the shopper has not yet made a purchase, Marketing Cloud sends them a different creative.

9. The Shopper exits the Marketing Cloud journey.

Understand the Flow of Data with Marketing Cloud Personalization (formerly Interaction Studio)
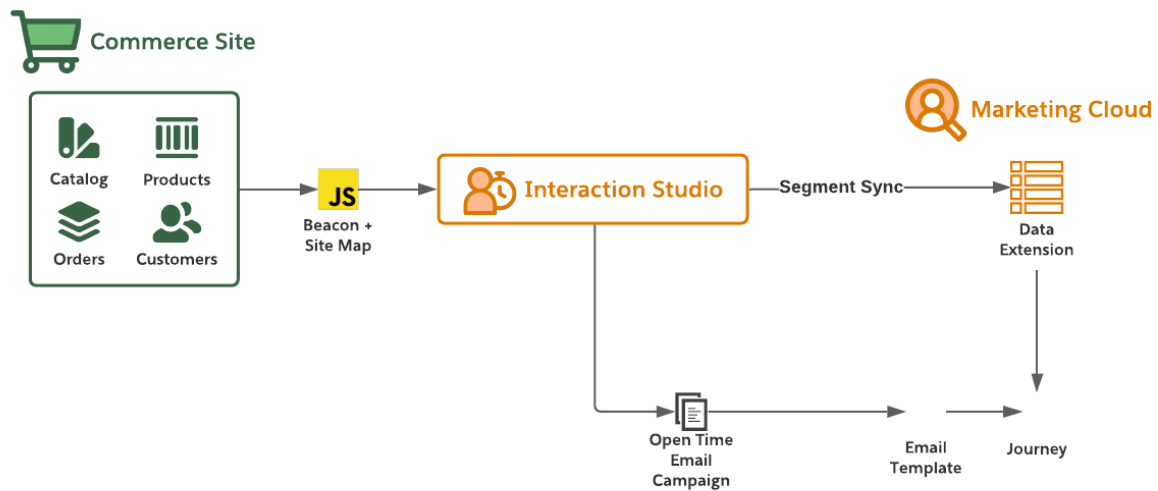
Functionality Considerations

- License Marketing Cloud Personalization to use the JavaScript beacon and site map.
- Use Marketing Cloud Personalization Open-Time Email Campaigns to shape email content, including product recommendations.
- Use Marketing Cloud Personalization Segments to monitor storefront shopper behavior and trigger email content for abandoned browse and cart scenarios.
- Use Marketing Cloud Personalization's Segment Exporter to automatically export Personalization segment data to a CSV file on a daily basis.
- Load order data into Marketing Cloud for suppressing shoppers who have completed their purchase after the segment is received from Marketing Cloud Personalization.

Performance Considerations

- Limit data imported into Marketing Cloud to 1 million rows per import. If your data volume exceeds 1 million rows, consider multiple imports.
- Use data extensions to import data into Marketing Cloud for personalization or segmentation.
- Avoid importing data into Marketing Cloud for "pre-processing" or "data-lake" activities.

Related Content

Review this solution's use case and purpose.

Take the next steps in this implementation.

- Design Considerations
- Integration Reference Implementation
- Configurations

Design Considerations

Keep these design considerations in mind when you turn abandoned carts into completed sales.

Configuring Commerce Cloud to Marketing Cloud Data Feeds

- To add recommendations in email from Marketing Cloud, confirm that you've set up the required customer, catalog, and order feeds. See the Marketing Cloud SFTP Guide.

- To generate the best recommendations, customize the catalog feed with product categorization data.

- To deliver data to Marketing Cloud during periods of low traffic, configure the data feeds in B2C Commerce Enterprise.

collect.js

- Use and extend the collect.js reference implementation to implement behavioral monitoring on the B2C Commerce Enterprise storefront. Detailed instructions are also provided during the Marketing Cloud Personalization Builder implementation process based on attributes selected to be tracked.

- Apply the reference implementation to accelerate the collect.js implementation through the storefront.

- To customize the data-layer exposed to Marketing Cloud, use the reference implementation's configuration capabilities.

Primary Keys

Identify customer profiles using a common identifier to developing a 360 view of your customers.

- Marketing Cloud

  - The contact key REST: recipient.contactKey is the cross-channel customer ID established by the customer.

  - Email Studio registers a subscriber key used for compliance management. SOAP: SubscriberKey is the same value as the contact key. API calls use this value to trigger email sends from Commerce Cloud to Marketing Cloud.

  - Avoid using Email Address, SMS number, or Mobile Device ID as the contact key in Marketing Cloud.

- Commerce Cloud

  - CustomerID is the system-generated ID for a customer.

  - Customer.Profile.customerNo is the number used to identify customers.

  - Decorate the Commerce Cloud Customer record with the CRM ContactID using b2c-crm-sync, a reference implementation for integration of Salesforce CRM and B2C Commerce.

  - For guest checkout, retrieve the SubscriberKey via Marketing Cloud APIs or Contact ID via CRM APIs. If no SubscriberKey or Contact ID exists, create a contact in CRM.

  - To learn more about integrating B2C Commerce with Service Cloud, review the Enablement Framework B2C-CRM-Sync.

- Sales and Service Cloud

  - Using a CRM Record ID simplifies CAN-SPAM compliance and the GDPR logical model.

  - Marketing Cloud Connect requires the primary key from Service Cloud for sending Marketing Cloud tracking data back into CRM.

  - Using a CRM ContactID also simplifies integration with Experience Cloud and Commerce Cloud.

Subscription Preferences

The reference implementation enables customers to update their subscription preferences in Marketing Cloud via the B2C Commerce Enterprise storefront.

Catalogs

- Streaming updates isn't efficient for large numbers of product SKUs.

- Language, currency, multi-brand support, and inventory affect the catalog feed model.

- Extend the catalog feed model to support multiple languages, brands, and currencies.

Click Tracking to Revenue

- The Marketing Cloud Einstein base capability provides core functionality to track revenue.
- Evaluate Google Analytics as a mechanism that slices and dices the data. See Google Analytics 360 Integration for Marketing Cloud.

Performance

- For best results when importing the flat file into Marketing Cloud, limit imported data-set sizes to 1 million rows.
- If your catalog includes more than 1 million SKUs, import the catalog using delta files.
- Import only the data you plan to use in Marketing Cloud. Use the imported data for one of two purposes: segmentation or personalization.
- If the volume or frequency of your catalog update concerns you, contact your Marketing Cloud representative or Success Manager.

Localization

- To support localization, customize the reference implementation.
- If you have different inventory for the same products, consider creating a different business unit. Contact your Marketing Cloud representative or Success Manager.

Multiple Brands

- Understand what your goals are for incentives, especially with shared carts across brands, and how best to present those incentives.
- Supporting Abandoned Cart with a shared cart across multiple brands increases the delivery complexity of this use case.
- Consider multiple business unit licenses that balance incentives and generate the most relevant recommendations across brands.

Related Content

←	Review earlier steps in this solution. - Abandoned Cart Solution Workflow
→	Take the next steps in this implementation. - Integration Reference Implementation - Configurations

See Also

Configuration

- Google Analytics 360 Audience Activation
- Implementing the Collect.js Tracking Code

Email, Marketing, and Streaming

- Einstein Email Recommendations
- Marketing Cloud Connector for B2C Commerce
- Marketing Cloud SFTP Guide
- Request a Quote from Marketing Cloud Professional Services
- Stream Catalog Updates Through Collect Tracking Code

Integration Reference Implementation

Integration reference implementations are developer enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns. Use the Marketing Cloud reference implementation for B2C Commerce to turn abandoned carts into completed sales.

After you sign in to GitHub, the Marketing Cloud reference implementation for B2C Commerce facilitates the platform customizations necessary to integrate Commerce Cloud and Marketing Cloud.

Before implementing, consider conducting an environmental audit with a Marketing Cloud representative to confirm that you meet the prerequisites for the use case.

Before implementing the configurations, **sign in to GitHub** and set up the Marketing Cloud reference implementation using the GitHub repository wiki instructions. If you're a Commerce Cloud customer or partner without access to the GitHub repository, get Unified Authentication to enable access.

General Information About Reference Implementations

- Reference implementations are developer-enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns.
- Reference implementations support a core set of use cases that you can extend to support other customer-driven use cases.
- Reference implementations require customization and configuration in Marketing Cloud and B2C Commerce Cloud. The Commerce Cloud storefront requires customization as part of the integration.
- Implementation and validation require operational and administrative experience with Marketing Cloud.
- Plan your implementation as you would any other B2C Commerce Cloud feature by collecting requirements, capturing work tasks, and making task estimates.

What Your Company Can Do with This Reference Implementation

- Accelerate integration time to market for Commerce Cloud and Marketing Cloud.
- Simplify and centralize email authoring and content management.
- Improve marketing agility, efficiency, and campaign performance.
- Personalize engagement based on past purchases and shopper interactions.
- Capture revenue from cart, search, or browse abandonments by implementing storefront behavior monitoring and behavioral email delivery.
- Connect Commerce Cloud and Marketing Cloud using existing REST APIs exposed by Commerce and Marketing Clouds.
- Enable one-way sharing of customer, catalog, and order data from B2C Commerce Cloud to Marketing Cloud using the Connector's data feed framework.
- Trigger transactional email sends from Commerce Cloud that Marketing Cloud delivers.

Related Content

← Review earlier steps in this solution.
- Abandoned Cart Solution Workflow
- Design Considerations

→ Take the next steps in this implementation.
- Configurations

Configurations

Use these configurations to turn abandoned carts into completed sales.

Implement and Customize the collect.js Code in Commerce Cloud

First, implement the collect.js tracking code in Commerce Cloud.

📝 **Note:** For this customization work, use the reference implementation of collect.js. If needed, extend the collect.js implementation.

After completing the collect.js implementation, validate the setup and behavior tracking events. Ensure that the collect.js track-cart call is operating as expected. This call sends the entire cart every time.

Set Up Catalog Importing in Marketing Cloud

Use the Marketing Cloud reference implementation to import a catalog with many SKUs into Marketing Cloud using the SFTP import process. For SKU imports that require constant product updates during the day, such as flash sales, configure streaming updates in Marketing Cloud to incrementally import catalog updates.

Set Up Behavioral Triggers in Marketing Cloud

📝 **Note:** Use Marketing Cloud technical expertise to configure the journeys and automations necessary based on each customer's data model.

- To get started, implement Behavioral Triggers.
- Marketing Cloud Collect Tracking code listens for abandoned cart events using the behavioral data collected by the collect.js code. You can configure a custom schedule to evaluate abandonment events every one, two, or three hours.
- After the timer ends, Behavioral Triggers write an abandonment event in near real time to data extensions. To trigger the abandon journey, connect the data extension in Marketing Cloud to a Journey's entry event.

Deliver the Cart Abandonment Emails via Marketing Cloud

Build an email template with the appropriate promotions for the target products. See Create a Behavior Trigger Email.

Author a journey in Marketing Cloud that delivers personalized abandoned cart emails to each identified customer.

This image shows an example Abandoned Cart journey.

- Map the journey with wait periods and defined customer touch points.
- Define the data extension entry event that puts the customer on a journey.
  - Set the Marketing Cloud entry event to Recurring. This setting admits contacts as often as you specify and listens for events based on a configured timeline.

- – Or, set the Marketing Cloud event to Automation. This setting admits contacts based on a schedule and triggers the journey process when Marketing Cloud events are invoked.

- Check Commerce Cloud to ensure that promoted products are in stock and purchasable, for example product inventory.

- Consider blocking specific products in customer abandonment scenarios, such as sold out products with no backorder plans.

- To personalize each email with abandoned items, use the content block functionality within Marketing Cloud Behavioral Triggers. Or, build a content block with Open-Time Email content from Interaction Studio.

- Include a URL-based definition of the cart contents in all email call-to-action URLs activated by customers. Rebuild the cart using the storefront.

📝 Note: The Marketing Cloud reference implementation doesn't include logic to pass the contents of the abandoned cart to Commerce Cloud. It also doesn't include logic to rebuild the cart. Customers and Partners are responsible for implementing both of these capabilities.

- Extend the storefront experience to look for the cart definition provided by the Marketing Cloud Abandoned Cart email activation link. Use the definition to rebuild the customer's cart regardless of their authentication status in the storefront.

Re-Create Carts

- Define business rules to either add products from the email to the customer's cart or to replace the cart. You can include these business rules in the rebuilding code customization for the cart.

- Configure the cart logic to verify cart inventory via the abandonment email.

- Pass the cart contents to Commerce Cloud using URL variables. Extend the storefront to support that URL schema. Use that data to rebuild the cart. Verify that the abandoned cart email template adhered to the cart definition URL Schema expected by Commerce Cloud.

- When a shopper clicks a call-to-action link in an abandoned cart email, the call-to-action link must contain the cart definition following the supported URL schema. Extend the storefront URL included in the call-to-action link to look for cart definitions in the URL and rebuild the cart if a definition is found.

Add Einstein Email Recommendations

- Get a licensed copy of Einstein Email Recommendations.

- Use the existing data from B2C Commerce, such as customer and order data, to generate personalized recommendations using Einstein Block in Content Builder.

- For more information, see the Personalized Marketing Recommendations Solution Kit.

- See Einstein Email Recommendations.

Enable Click Tracking

To track shoppers who click abandoned cart email links, view Marketing Cloud tracking reports or use your own click tracking solution. You can also use click tracking to:

- Track data in Einstein to predict behavior with Messaging Insights.

- Track data and create reports using a Datorama dashboard in Marketing Cloud.

- Get insights about shopper purchases using Google Analytics 360. See Google Analytics 360 Audience Activation.

Related Content

← Review earlier steps in this solution.

- Abandoned Cart Solution Workflow
- Design Considerations

- Integration Reference Implementation

Redeem Coupons

Offer targeted customer journeys and increase positive purchasing decisions. Increase completed purchases, personalize the experience, and track coupon usage.

Get Started

Explore system architecture related to this solution.

- B2C Industry Blueprint
- B2C Reference Architecture
- B2C Solution Architectures

Take Trailhead modules related to this solution.

- Salesforce Solution Kits: Quick Look
- Customer 360 Guide for Retail: Quick Look
- Customer 360 Guides: Quick Look

This solution kit helps you:

- Increase completed purchases.
- Give shoppers a personalized experience.
- Incorporate coupon incentives in shopper journeys.
- Track coupon usage in Marketing Cloud and gain insights into what your shoppers want.

Required Products

- Journey Builder and Email Studio in Marketing Cloud Enterprise 2.0
- Commerce Cloud (SFRA or SiteGenesis)

Implement This Solution

Coupon Redemption Solution Workflow
Learn how data flows through the configurations to redeem coupons.

Design Considerations

Keep these design considerations in mind when you redeem coupons.

Integration Reference Implementation

Integration Reference Implementations are developer enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns. Use the Marketing Cloud reference implementation for B2C Commerce to redeem coupons.

Configurations

Use these configurations to redeem coupons.

Coupon Redemption Solution Workflow

Learn how data flows through the configurations to redeem coupons.

Workflow
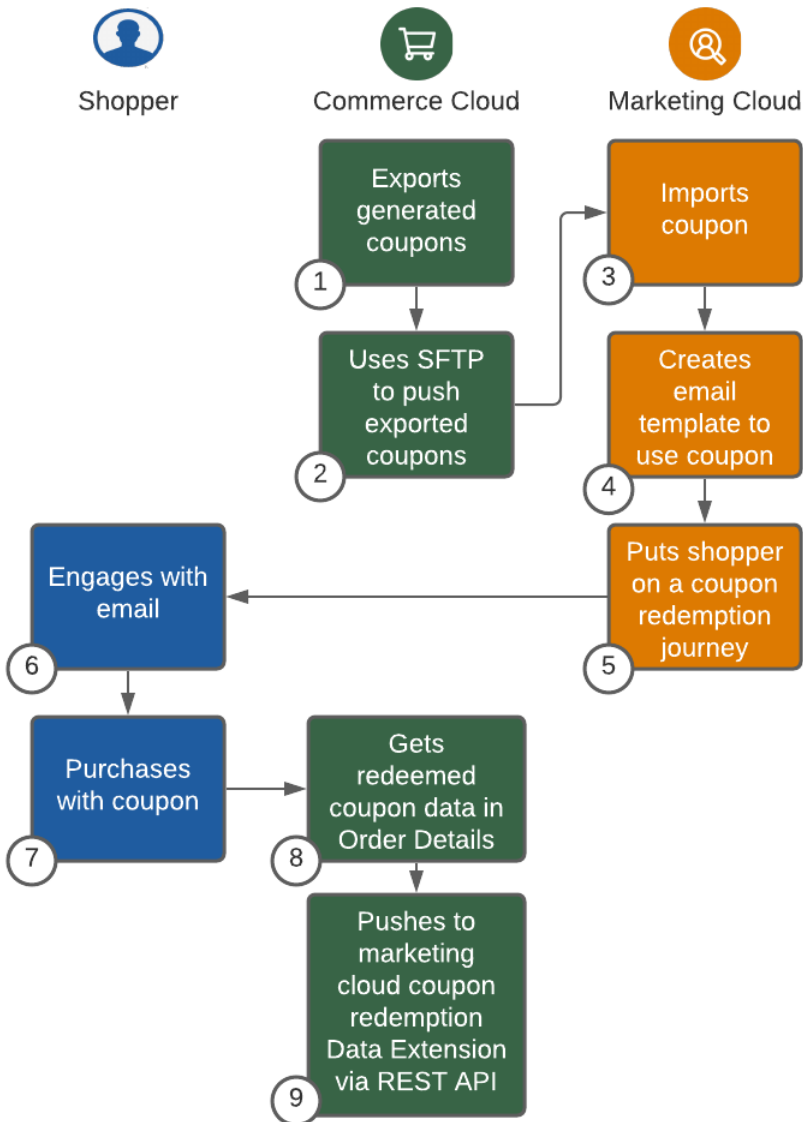
1. Commerce Cloud exports the generated coupon.

2. The exported coupons are pushed to Marketing Cloud using SFTP.

3. The coupons are imported into Marketing Cloud using a data extension.

4. A ClaimRow function for each customer creates email templates that retrieve a unique coupon code.

5. Marketing Cloud sends the email via Journey Builder to the shopper with their unique coupon.

6. The customer engages with the coupon email.

7. The customer makes a purchase using the coupon.

8. Commerce Cloud receives the redeemed coupon data in the Order Details.

9. The coupon redemption data extension is pushed to Marketing Cloud via REST API.

Understand the Flow of Data
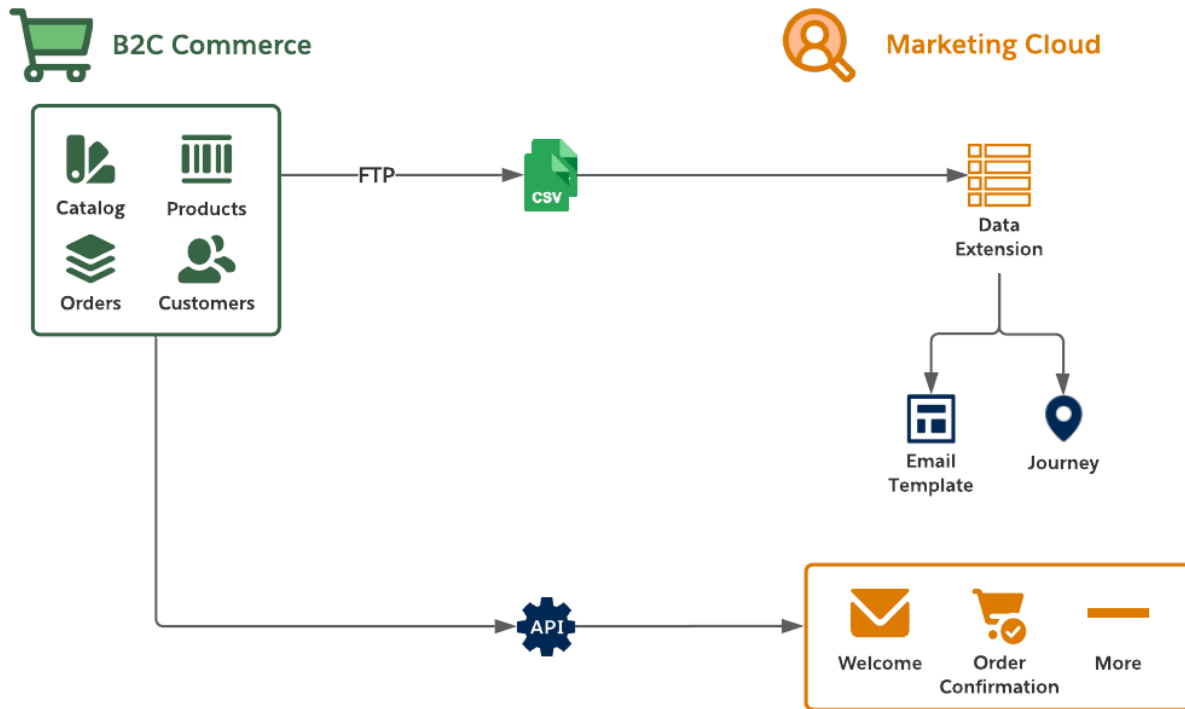
1. Collect the catalog, product, order, and customer data feeds from the B2C Commerce staging and production environments.

2. Move the data to the Marketing Cloud SFTP server and create Import Activities so that Marketing Cloud consumes it on a schedule via Automation Studio.

3. Use Commerce Cloud data in Marketing Cloud via data extensions during the authoring of email templates, creation of journeys, and development of personalized product recommendations.

4. Extend the Commerce Cloud storefront by replacing its email functions with the Marketing Cloud's trigger send features.

5. Implement framework customizations to trigger transactional email for common scenarios. These scenarios include Welcome Email, Order Confirmation, and Order Status Update Email.

Functionality Considerations

- We recommend that you regularly export coupons from Commerce Cloud via a scheduled process.

- Extend the reference implementation's data-feed framework to support coupon exports.

- Exported coupon codes are imported into a Marketing Cloud data extension.

- For coupon volumes greater than 1 million, use Commerce Cloud system-generated coupons.

- Commerce Cloud uses Marketing Cloud REST APIs to push redeemed coupon codes into a Marketing Cloud data extension after order completion.

- Use the redeemed codes within Marketing Cloud to track usage and prevent Marketing Cloud from sending reminders to customers for already redeemed coupons.

- Alternatively, Marketing Cloud can use AMPscript or script activities to retrieve coupon redemptions that Commerce Cloud tracks using Commerce Cloud Open Commerce Data API.

Related Content

	Review this solution's use case and purpose.
	• Redeem Coupons on page 74

	Take the next steps in this implementation.
	• Design Considerations
	• Integration Reference Implementation
	• Configurations

Design Considerations

Keep these design considerations in mind when you redeem coupons.

Coupon Generation Within a Commerce Cloud Storefront

- To generate coupons based on the type and use case, use standard capabilities. Examples of coupon use cases include single-use, multiple-use, and qualification dependencies.
- Coupons with more than 10,000 codes perform better with system-generated codes.
- Replication time slows when the total number of coupons across all sites exceeds 1 million. System-generated coupon codes don't increase replication time with increased coupon codes.
- Export coupons and their respective codes using the exportCoupons and exportCouponCodes pipelets.

Data Extension Within Marketing Cloud

- Set up a data extension in Marketing Cloud to house coupons. Set up the data extension schema to include the SubscriberKey, CouponCode, and EmailAddress fields.
  - If using ClaimRow function, include the IsClaimed (boolean) and ClaimedDate fields in the data extension schema.
  - For updating the coupon data extension with redemption details, include the [Order] Date, OrderId fields in the data extension schema.
- Export the source coupon pool data via Commerce Cloud Business Manager. Import this data into a Marketing Cloud data extension via an Import Activity in Automation Studio.
- Coupon codes can be pre-assigned to defined subscribers before an email send using a Query Activity in Automation Studio. Alternatively, coupon codes can be claimed at the time of email send by using the ClaimRow function in the email creative.
- Manually export the historical collection of coupon redemptions from Commerce Cloud Business Manager. Import these redemptions into the Marketing Cloud coupon redemption data extension via a separate Import Activity in Automation Studio.
- Configure the Marketing Cloud coupon redemption data extension to support asynchronous updates via the Marketing Cloud's Data Events REST API.
- The coupon redemption data captured from Commerce Cloud includes shoppers who redeemed coupons via the storefront. Configure a separate activity to identify which coupons shoppers haven't redeemed coupons, and drive the appropriate marketing journeys, such as coupon reminders.

Storefront Extension to Push Redemptions to Marketing Cloud

- Create and configure a Commerce Cloud service to push captured coupon redemptions to Marketing Cloud.
- Capture coupon redemptions by inspecting completed orders at the end of the checkout process.
- Push coupon redemptions to Marketing Cloud via the Commerce Cloud service after order processing transactions have completed.

- Audit and log service interactions to capture service call performance and failures.

Scalability

- If the storefront is prone to high bursts of traffic, discuss support for high traffic use-cases with your Marketing Cloud Success Manager. High bursts of traffic include increased coupon redemption scenarios and flash sales of many orders per second.
- To ensure a scalable capture of coupon redemptions by Marketing Cloud, use the Asynchronous Insert Data Event REST API, which supports request queuing.

Related Content

← Review earlier steps in this solution.
- Coupon Redemption Solution Workflow

→ Take the next steps in this implementation.
- Integration Reference Implementation
- Configurations

See Also

- Asynchronous Call Considerations in Marketing Cloud
- B2C - Campaigns and Qualifiers Playbook
- B2C - Coupon Codes Playbook
- Coupons.xsd import and export schema
- Managing System-Generated Codes

Integration Reference Implementation

Integration Reference Implementations are developer enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns. Use the Marketing Cloud reference implementation for B2C Commerce to redeem coupons.

After you sign in to GitHub, the Marketing Cloud reference implementation for B2C Commerce facilitates the platform customizations necessary to integrate Commerce Cloud and Marketing Cloud.

Before implementing, consider conducting an environmental audit with a Marketing Cloud representative to confirm that you meet the prerequisites for the use case.

Before implementing the configurations, **sign in to GitHub** and set up the Marketing Cloud reference implementation using the GitHub repository wiki instructions. Get started with Commerce API.

General Information About Reference Implementations

- Reference implementations are developer-enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns.
- Reference implementations support a core set of use cases that you can extend to support other customer-driven use cases.
- Reference implementations require customization and configuration in Marketing Cloud and B2C Commerce Cloud. The Commerce Cloud storefront requires customization as part of the integration.
- Implementation and validation require operational and administrative experience with Marketing Cloud.

- Plan your implementation as you would any other B2C Commerce Cloud feature by collecting requirements, capturing work tasks, and making task estimates.

What Your Company Can Do with This Reference Implementation

- Accelerate integration time to market for Commerce Cloud and Marketing Cloud.

- Simplify and centralize email authoring and content management.

- Improve marketing agility, efficiency, and campaign performance.

- Personalize engagement based on past purchases and shopper interactions.

- Capture revenue from cart, search, or browse abandonments by implementing storefront behavior monitoring and behavioral email delivery.

- Connect Commerce Cloud and Marketing Cloud using existing REST APIs exposed by Commerce and Marketing Clouds.

- Enable one-way sharing of customer, catalog, and order data from B2C Commerce Cloud to Marketing Cloud using the reference implementation's data feed framework.

- Trigger transactional email sends from Commerce Cloud that Marketing Cloud delivers.

> 📝 **Note:** The Coupon Redemption use-case described in this solution kit isn't included with the Marketing Cloud reference implementation. This solution kit provides guidance on how to extend the Marketing Cloud reference implementation to support this use-case.

Related Content

← Review earlier steps in this solution.

- [Coupon Redemption Solution Workflow](#)
- [Design Considerations](#)

→ Take the next steps in this implementation.

- [Configurations](#)

Configurations

Use these configurations to redeem coupons.

Configuration Steps

1. Set up a data extension in Marketing Cloud to house coupon redemptions. Set up the data extension schema to include these fields: Coupon Code, Date, OrderId, and Email.

   - The redemption represents the email address of the user who redeemed the coupon.

   - This schema adheres to how Commerce Cloud Business Manager exports coupon redemptions.

   - This behavior follows the [coupon redemption schema](#) that Business Manager exports.

   - Consider creating the data extension with a data retention policy to automatically remove legacy data that's no longer actionable from the data extension.

2. Export the relevant historical collection of coupon redemptions from Commerce Cloud Business Manager. To use historical coupon redemption data, export the relevant and actionable coupon redemptions from Business Manager in .csv format.

3. Import the Commerce Cloud coupon redemption data into the newly created Marketing Cloud coupon redemption data extension.

- This activity seeds the redemptions that are now available to Marketing Cloud.

- Use this data extension to look up redemptions by coupon and customer.

- To maintain a consistent and predictable level of performance, prune legacy redemption data from this data extension.

- Remove legacy data that is no longer actionable from the data extension.

4. To incrementally update the Marketing Cloud coupon redemptions data extension, create a service in Commerce Cloud.

- Configure the service to point to your Marketing Cloud instance.

- The service adds newly captured coupon redemptions to the coupon redemption data extension.

- The service uses Marketing Cloud's Data Events API.

5. Extend the Commerce Cloud storefront to inspect completed orders for coupon redemptions.

- Extend the checkout process to identify redeemed coupons attached to placed orders.

- Perform this check after the order transaction has completed so that the transaction and core checkout logic isn't disturbed.

6. Send the coupon redemptions to Marketing Cloud via its Data Events REST API as the redemptions are identified in completed orders.

- This call delivers the coupon redemption information to the Marketing Cloud coupon redemption data extension.

- Ensure that the call payload adheres to the coupon redemption data extension schema.

- Initiate the call after Commerce Cloud processes and completes the order transaction.

7. To verify whether a coupon was redeemed, use the coupon redemption data extension within a journey decision split.

- Look up redemptions within the data extension by coupon code and email address. This action can require additional SQL query activity in Automation Studio.

- For any subscribers who have redeemed coupons, you can alter the subscriber's journey path. For example, don't send a coupon reminder or send a different coupon.

Related Content

Review earlier steps in this solution.

- Coupon Redemption Solution Workflow
- Design Considerations
- Integration Reference Implementation

Order on Behalf of a Customer

Place orders on behalf of shoppers who need assistance because they can't access the Internet or find the products they want to purchase.

Get Started

Explore system architecture related to this solution.

- B2C Industry Blueprint
- B2C Reference Architecture
- B2C Solution Architectures

Take Trailhead modules related to this solution.

- Salesforce Solution Kits: Quick Look
- Customer 360 Guide for Retail: Quick Look
- Customer 360 Guides: Quick Look

This solution kit helps you:

- Increase completed purchases.
- Give your shoppers a personalized experience when you connect Commerce Cloud and Service Cloud.
- Provide exceptional customer service experiences.
- Increase shopper engagement.

Required Products

- Commerce Cloud (SFRA or SiteGenesis)
- Service Cloud

Implement This Solution

Order on Behalf Solution Workflow

Learn how data flows through the configurations to order on behalf of a customer.

Design Considerations

Keep these design considerations in mind when you order on behalf of a customer.

Integration Reference Implementation

Integration reference implementations are developer enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns. Use the b2c-crm-sync integration reference implementation to order on behalf of a customer.

Configurations

Use these configurations to order on behalf of a customer.

Order on Behalf Solution Workflow

Learn how data flows through the configurations to order on behalf of a customer.

Workflow
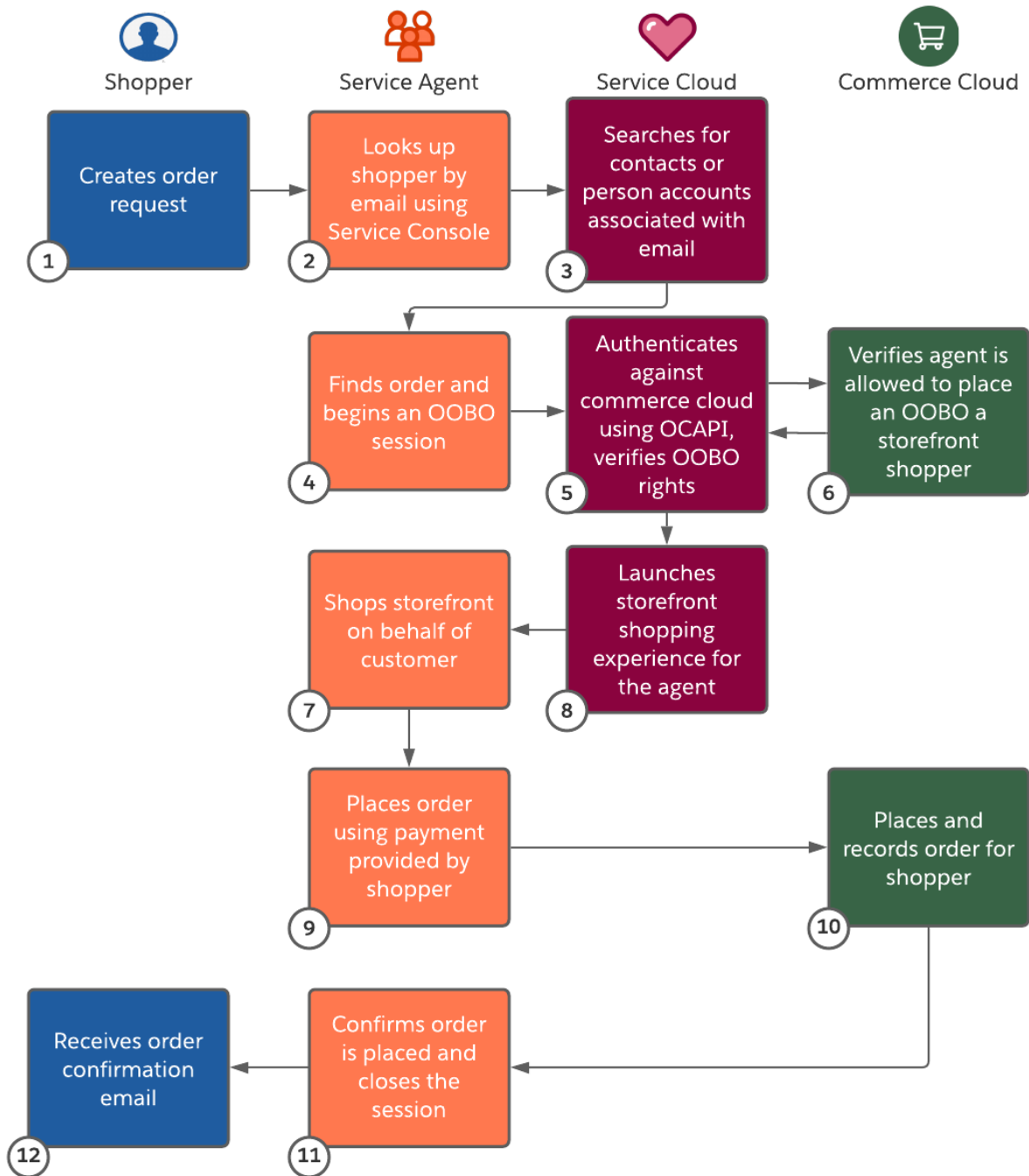
1. The shopper contacts a service agent with an order request.
2. The agent looks up the shopper using their email address via the Service Console.
3. Service Cloud searches for any person accounts or contacts associated with the shopper's email address.
4. The agent initiates an Order on Behalf Of (OOBO) session via Lightning Quick Action.
5. Service Cloud authenticates against Commerce Cloud using the Open Commerce API verifying that the agent has OOBO rights.

6. Commerce Cloud verifies that the agent has the right to place an OOBO for a storefront shopper.

7. Service Cloud launches the storefront shopping experience for the agent with OOBO enabled.

8. The agent shops the storefront on behalf of the shopper.

9. The agent places the order using the payment information provided by the shopper.

10. The order is placed and recorded for the specific shopper.

11. The agent confirms the order is placed with the shopper and closes the OOBO session.

12. The shopper receives the order confirmation email generated for the OOBO placed order.

Understand the Flow of Data
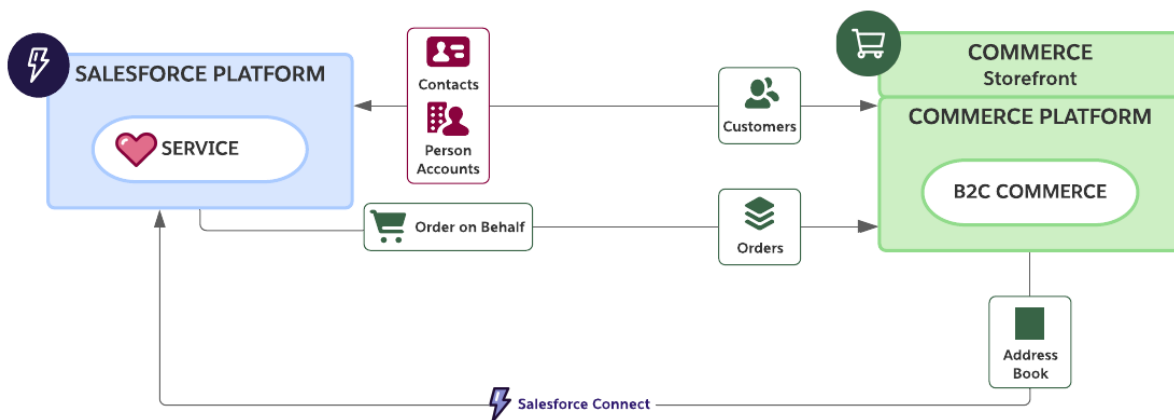
Functionality Considerations

The b2c-crm-sync reference implementation:

- Supports both person accounts and account and contact customer models within the Salesforce Customer 360 platform.

- Supports synchronization of registered Salesforce B2C Commerce customer profiles between the Salesforce Customer 360 Platform and Salesforce B2C Commerce. The synchronization happens near real time via a scheduled B2C Commerce job.

- Supports OOBO shopping for customer service representatives configured and launched from within the Salesforce platform for both registered and anonymous shoppers.

- Uses Salesforce B2C Commerce open commerce REST APIs to interact with B2C Customer profiles.

- Supports multiple B2C sites and customer lists.

Implementation Considerations

The b2c-crm-sync reference implementation:

- Requires a B2C Commerce sandbox and Salesforce DevHub capable of creating scratch orgs.

- Requires a Salesforce Enterprise Edition configured with Salesforce Connect to take advantage of the federated B2C customer address book feature included with b2c-crm-sync.

- Uses node.js enabled CLI and Salesforce CLI commands. Salesforce CLI is one of the Salesforce DX (Developer Experience) tools.

- Works with existing B2C Commerce storefronts.

- Requires that Business Manager users representing customer service agents have B2C Commerce permissions to log in and place orders on behalf of registered storefront shoppers.

- Requires setup of B2C Commerce Access Keys as an alternative form of authentication when logging in to Business Manager via external applications. Applications include WebDAV File Access, UX Studio Agent, User Login, OCAPI, and Protected Storefront Access.

- Requires that Salesforce B2C Commerce environment's OCAPI data API permissions are enabled to support remote interactions.

- Requires extending the B2C Commerce instance's OCAPI permissions to allow the Salesforce org to create a storefront session for the OOBO shopping experience.

- Requires an integration user with administrative rights configured in Service Cloud.

- Enables functionality for agents from the customer details display in Service Cloud.

- Requires a Service Cloud connected app supporting OAuth authentication.

- Registers B2C Commerce as a remote site.

- Lets you launch from within Service Cloud. Include the Commerce Cloud customer number and internal customer ID in the person or standard account.

Related Content

Review this solution's use case and purpose.

- Order on Behalf of a Customer on page 81

Take the next steps in this implementation.

- Design Considerations
- Integration Reference Implementation
- Configurations

Design Considerations

Keep these design considerations in mind when you order on behalf of a customer.

Storefront Shoppers

- When the agent launches the Order on Behalf capability, the Commerce Cloud Customer ID registers the session. The Service Cloud person account or contact uses the Commerce Cloud Customer ID to launch the Order on Behalf capability.

- B2c-crm-sync extends the B2C Commerce OOBO capability to anonymous storefront shoppers by creating B2C Commerce customer profiles. Service agents use these profiles to authenticate against B2C Commerce in anonymous shopping sessions.

Commerce Cloud Authentication

- The OOBO shopping experience requires that service agents in the Salesforce platform authenticate against the B2C Commerce environment before creating the shopping session. A named credential manages this authentication for each user via the Salesforce platform.

- Update access keys every 365 days.

Map Custom Fields

- Map only the fields for which you need data.

- Use B2C integration field mappings to map fields for contacts or person accounts.

- Use the b2c-crm-sync alternative page layouts for contacts and person accounts as a starting point. Consider how to customize your existing Salesforce customer layouts. These layouts expose the initial set of custom fields added to contacts and person accounts to support synchronization with B2C Commerce.

- Every REST call between Commerce Cloud and Service Cloud counts towards API governor limits.

- To request a governor limit increase, contact your Salesforce Account Executive.

    Note: You can include order details in Service Cloud by integrating with the Salesforce Order Management System (OMS) or your own supported OMS.

Related Content

Review earlier steps in this solution.

- Order on Behalf Solution Workflow

Take the next steps in this implementation.

- Integration Reference Implementation
- Configurations

See Also

- B2C Custom Hooks Overview
- B2C Order.xsd Salesforce XML Schema
- B2C Sample order.xml

Integration Reference Implementation

Integration reference implementations are developer enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns. Use the b2c-crm-sync integration reference implementation to order on behalf of a customer.

After you sign in to GitHub, the b2c-crm-sync solution designed by Salesforce Architects facilitates the integration between Salesforce B2C Commerce Cloud and Service Cloud. The reference implementation provides a framework to integrate the clouds by using public REST APIs to share and sync data.

Before implementing, sign into GitHub and download b2c-crm-sync. Follow the installation instructions available from the repository ReadMe.md file.

Are you a new Commerce Cloud customer or partner and don't have access to the GitHub repository? Get started with the Commerce API.

General Information About Reference Implementations

- Reference implementations are developer-enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns.

- Reference implementations support a core set of use cases that you can extend to support other customer-driven use cases.

- require customization and configuration in Service Cloud and Commerce Cloud. The Commerce Cloud storefront requires customization as part of the integration.

- Implementation and validation require operational and administrative experience with Service Cloud.

- Plan your implementation as you would any other B2C Commerce Cloud feature by collecting requirements, capturing work tasks, and making task estimates.

What Your Company Can Do with This Reference Implementation

- Share views of customers and order data between both clouds

- Offer self-service through automated case creation using the storefront
- Facilitate agent-to-customer conversations that encourage cross-sell and up-sell opportunities
- Real-time peer-to-peer data synchronization for customer, order, and case data between Commerce Cloud and Service Cloud
- Source code that allows for storefront or Service Cloud customization based on service needs
- Faster integration time to market for both clouds when specifically targeting the supported use cases

Related Content

←	Review earlier steps in this solution.
	- Order on Behalf Solution Workflow
	- Design Considerations
→	Take the next steps in this implementation.
	- Configurations

Configurations

Use these configurations to order on behalf of a customer.

These configurations let your agents place orders on behalf of shoppers using the Order Lightning components in Service Cloud and Commerce Cloud.

> ✏️ **Note:** Before starting configurations, synchronize B2C Commerce and Service Cloud using the b2c-crm-sync reference implementation. See the Integration Reference Implementation section of this document for the GitHub repository wiki instructions link.

Permission Settings

- Before giving agents Order on Behalf permissions, verify that the agents are Service Cloud and Commerce Cloud users with Order on Behalf rights.
- To give the correct permissions, use "Login_On_Behalf," "Login_Agent," and "Create_Order_On_Behalf_Of" business manager functional permissions.
- For more information about permissions, see the B2C Roles and Permissions and Functional Permissions pages.
- Define the agent account authentication settings for external systems in Service Cloud. For more information, see Store Authentication Settings for External Systems.

Lightning Page Layout

1. Drag the Launch Shopping Cart Lightning component to the Contact and Person Account page layouts.

   > ✏️ **Note:** You can launch OOBO from the Contact Detail or Person Account Detail page layouts. Additionally, if you would like to allow OOBO from a case, you can build a flow from any record that references the contact ID and pass it into B2CCommerce_QuickAction_Contact_OrderOnBehalfOf.

2. Review integration mappings to ensure they align with your business requirements.

   > ✏️ **Note:** You can view order details in Service Cloud by using Salesforce OMS or your own supported OMS.

Related Content

← Review earlier steps in this solution.
- Order on Behalf Solution Workflow
- Design Considerations
- Integration Reference Implementation

Personalize Marketing Recommendations

Keep shoppers interested in your products using email recommendations based on merchandise that your customers already purchased from you.

Get Started

Explore system architecture related to this solution.
- B2C Industry Blueprint
- B2C Reference Architecture
- B2C Solution Architectures

Take Trailhead modules related to this solution.
- Salesforce Solution Kits: Quick Look
- Customer 360 Guide for Retail: Quick Look
- Customer 360 Guides: Quick Look

This solution kit helps you:

- Increase storefront visits.
- Increase engagement.
- Recommend products based on individual shopping history.
- Give your shoppers a personalized experience when you connect Commerce Cloud and Marketing Cloud.

Required Products

- Marketing Cloud Enterprise 2.0
  - Personalization Builder
  - Journey Builder

- – Email Studio

- Commerce Cloud (SFRA or SiteGenesis)

  - – Einstein Product Recommendations

Optional Products

- Interaction Studio

Implement This Solution

Personalized Marketing Recommendations Solution Workflow

Learn how data flows through the configurations to personalize marketing recommendations.

Design Considerations

Keep these design considerations in mind when you personalize marketing recommendations.

Integration Reference Implementation

Integration reference implementations are developer enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns. Use the Marketing Cloud reference implementation for B2C Commerce to personalize marketing recommendations.

Configurations

Use these configurations to personalize marketing recommendations.

Personalized Marketing Recommendations Solution Workflow

Learn how data flows through the configurations to personalize marketing recommendations.

Workflow
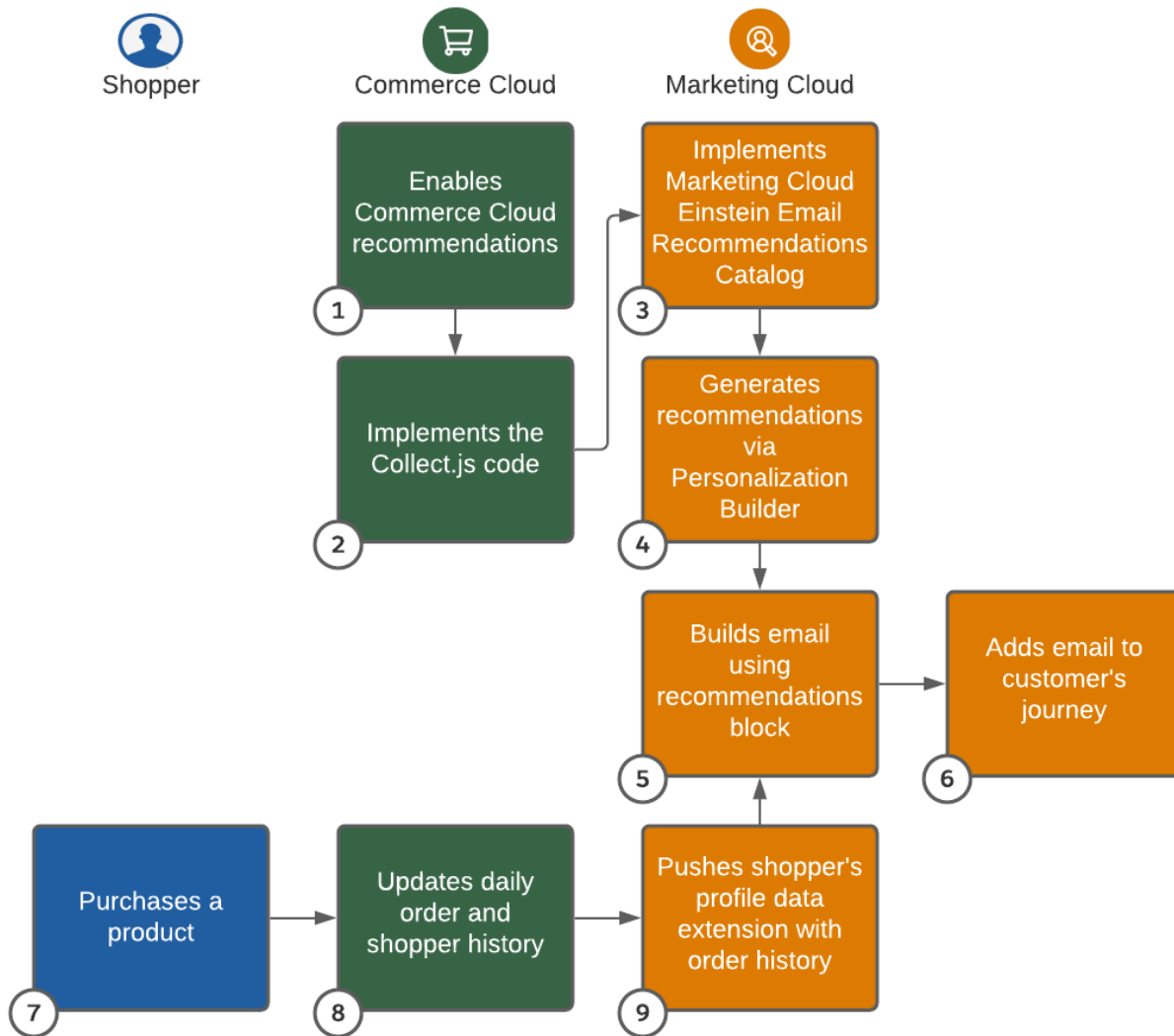
1. As an optional step, B2C Commerce Cloud enables Recommendations.

2. B2C Commerce Cloud implements Collect.js code.

3. Marketing Cloud implements the Email Recommendations Catalog.

4. Marketing Cloud generates recommendations via Personalization Builder.

5. Marketing Cloud builds emails using the recommendations block.

6. Marketing Cloud adds an email to the customer's journey.

7. The shopper purchases a product.

8. B2C Commerce Cloud updates the daily order and shopper history.

9. Marketing Cloud pushes the shopper's profile and order history data extensions.

Understand the Flow of Data
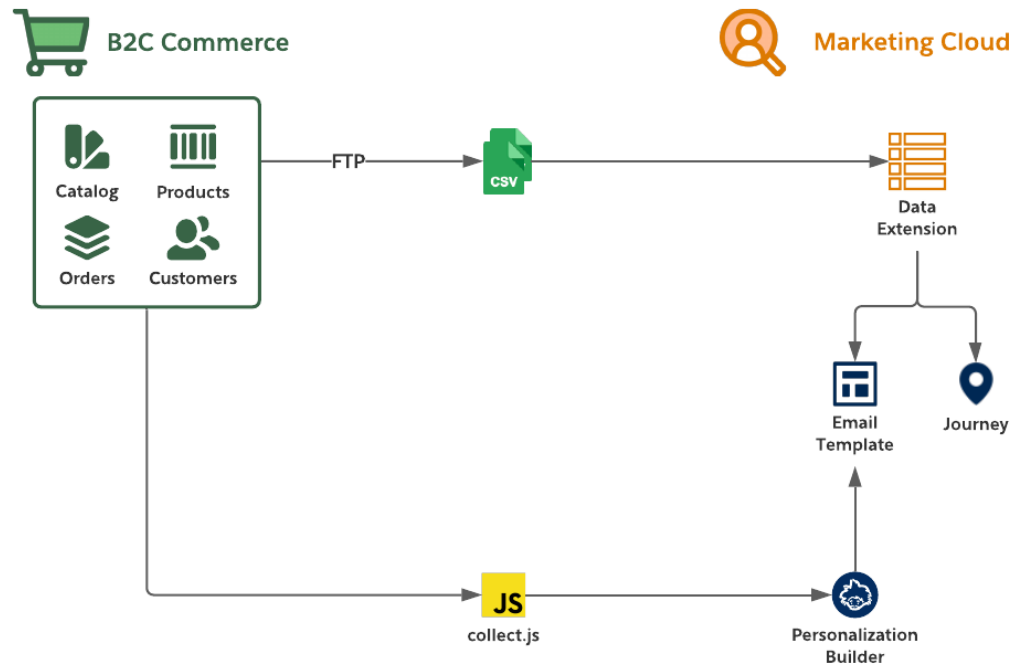
1. Collect the catalog, product, order, and customer data feeds from the B2C Commerce staging and production environments.

2. Move the data to the Marketing Cloud SFTP server and create import activities so that Marketing Cloud consumes it on a schedule via Automation Studio.

3. Use Commerce Cloud data in Marketing Cloud via data extensions during the authoring of email templates, creation of journeys, and development of personalized product recommendations.

4. Implement and extend the Marketing Cloud collect.js through the storefront by using the reference implementation. Personalization Builder uses information on shopper activity to personalize recommendations.

Features of Integration Support

- HTTP, HTTP Form, FTP, SFTP, and SOAP service types.
- Every B2C Commerce instance includes an embedded WebDAV server and client, ensuring PCI-compliant file transfers over HTTPS.

Functionality Considerations

- License Personalization Builder as part of Marketing Cloud to use collect.js.
- The reference implementation supports delivery of Commerce Cloud-driven data feeds to Marketing Cloud through SFTP (customers, catalogs, and orders).
- Use data feeds that Marketing Cloud consumes to shape email content, including storefront product recommendations.
- A collect.js storefront implementation can monitor storefront shopper behavior to influence recommendations using Personalization Builder in Marketing Cloud.

Performance Considerations

- Plan your B2C Commerce data feed consumption to support your expected volume and Marketing Cloud use cases.

- Limit data imported via the connector feed framework to 1 million rows per import. If your data volume exceeds 1 million rows, consider multiple imports.

- Use data extensions to import data into Marketing Cloud for only the two purposes of personalization or segmentation.

- Avoid importing data into Marketing Cloud for pre-processing or data-lake activities.

Alternative Solutions

Marketing Cloud Personalization (formerly Interaction Studio)

Learn how data flows through Marketing Cloud Personalization to personalize marketing recommendations.

Workflow with Marketing Cloud Personalization (formerly Interaction Studio)
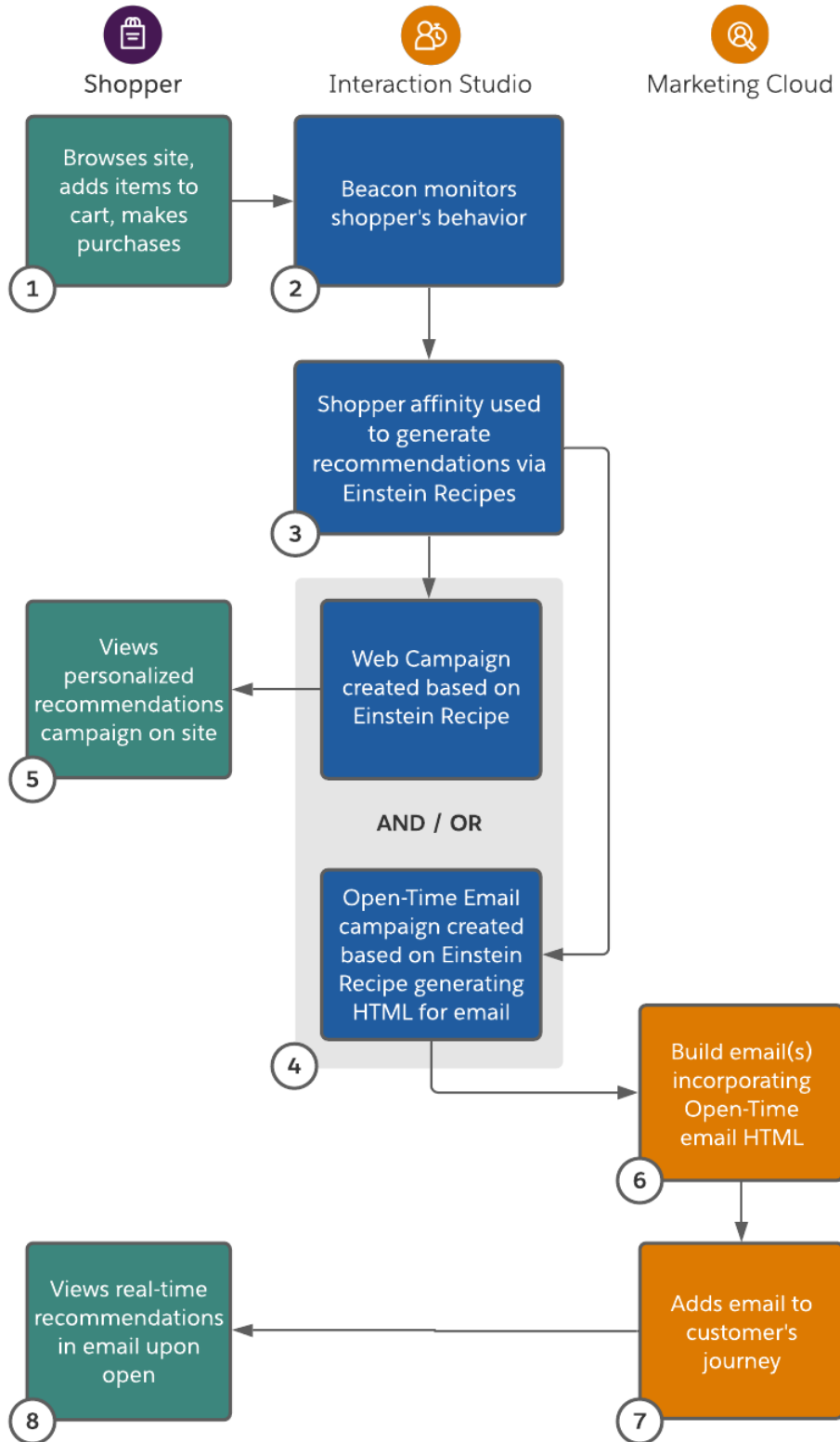
1. The shopper browses the site, adds items to their cart, and makes purchases.

2. Marketing Cloud Personalization monitors the shopper's behavior.

3. Marketing Cloud Personalization uses Einstein recipes to generate recommendations based on shopper's behaviors and affinity.

4. A Marketing Cloud Personalization web campaign or Open-Time email campaign determines recommendations to display based on Einstein recipes.

5. The shopper views their personalized recommendations on site.

6. Marketing Cloud builds an email using the HTML generated from Marketing Cloud Personalization's Open-Time email campaign.

7. Marketing Cloud adds an email to the customer's journey.

8. The shopper views the email with recommendations personalized in real time at the time of open.

Understand the Flow of Data with Marketing Cloud Personalization (formerly Interaction Studio)

Functionality Considerations

- License Marketing Cloud Personalization to use the JavaScript beacon and site map.
- Use Marketing Cloud Personalization Open-Time Email Campaigns to shape email content, including product recommendations.

Related Content
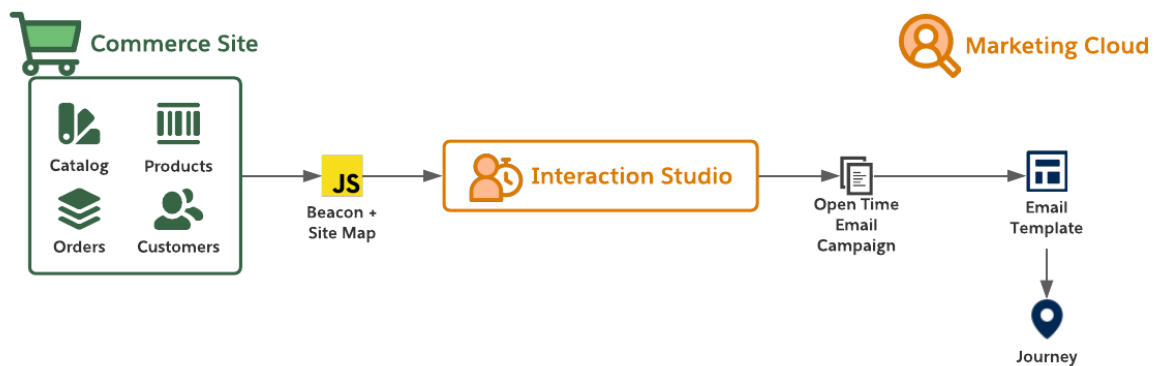
Review this solution's use case and purpose.

- Personalize Marketing Recommendations on page 88

Take the next steps in this implementation.

- Design Considerations
- Integration Reference Implementation
- Configurations

Design Considerations

Keep these design considerations in mind when you personalize marketing recommendations.

General Considerations

- Set up collect.js and Catalog for Marketing Cloud Einstein even if you import order history using the reference implementation.

- To generate personalized recommendations using Content Builder dynamic content, use existing data like customer and order data from B2C Commerce.

- Use Order History data for other elements of the email.

- Let the Einstein model do its work instead of defining many filters during rule definition for recommendation display.

- Email recommendations are different from Commerce Cloud storefront recommendations.

- Consistent recommendations are more important than matching recommendations. The goal is to use email to drive shoppers to the storefront to make a purchase.

Configuring Commerce Cloud to Marketing Cloud Data Feeds

- To add recommendations in email from Marketing Cloud, confirm that you've set up the required customer, catalog, and order feeds. See the Marketing Cloud SFTP Guide.

- To generate the best recommendations, customize the catalog feed with product categorization data.

- To deliver data to Marketing Cloud during periods of low traffic, configure the data feeds in B2C Commerce Enterprise.

Catalogs

- Streaming updates isn't efficient for large numbers of product SKUs.

- Language, currency, multi-brand support, and inventory affect the catalog feed model.

Click Tracking to Revenue

- Marketing Cloud Einstein base capability provides core functionality to track revenue.

- Evaluate Google Analytics as a mechanism for slicing and dicing the data. See Google Analytics 360 Integration for Marketing Cloud.

Performance

- For best results when importing the flat file into Marketing Cloud, limit your daily product variations in SKUs to 1 million.

- If your catalog includes more than 1 million SKUs, import delta files for the catalog.

- Import only the data you plan to use in Marketing Cloud.

- If the volume or frequency of your catalog update concerns you, contact your Marketing Cloud representative or Success Manager.

Localization

- To support localization, customize the reference implementation.

- If you have different inventory for the same products, consider creating a different business unit. Contact your Marketing Cloud representative or Success Manager.

Multiple Brands

- Understand what your goals are for incentives, especially with shared carts across brands, and how best to present those incentives.

- Avoid using the same cart across multiple brands.

- To ensure balanced incentives across brands, consider multiple business unit licenses.

Related Content

←	Review earlier steps in this solution. • Personalized Marketing Recommendations Solution Workflow
→	Take the next steps in this implementation. • Integration Reference Implementation • Configurations

See Also

- B2C Custom Hooks Overview
- B2C Order.xsd Salesforce XML Schema

Integration Reference Implementation

Integration reference implementations are developer enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns. Use the Marketing Cloud reference implementation for B2C Commerce to personalize marketing recommendations.

After you sign in to GitHub, the Marketing Cloud reference implementation for B2C Commerce facilitates the platform customizations necessary to integrate Commerce Cloud and Marketing Cloud.

Before implementing, consider conducting an environmental audit with a Marketing Cloud representative to confirm that you meet the prerequisites for the use case.

Before implementing the configurations, **sign in to GitHub** and set up the Marketing Cloud reference implementation using the GitHub repository wiki instructions. Are you a Commerce Cloud customer or partner? Get started with Commerce API.

General Information About Reference Implementations

- Reference implementations are developer-enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns.
- Reference implementations support a core set of use cases that you can extend to support other customer-driven use cases.
- Reference implementations require customization and configuration in Marketing Cloud and B2C Commerce Cloud. The Commerce Cloud storefront requires customization as part of the integration.
- Implementation and validation require operational and administrative experience with Marketing Cloud.
- Plan your implementation as you would any other B2C Commerce Cloud feature by collecting requirements, capturing work tasks, and making task estimates.

What Your Company Can Do with This Reference Implementation

- Accelerate integration time to market for Commerce Cloud and Marketing Cloud
- Simplify and centralize email authoring and content management
- Trigger transactional email from Marketing Cloud through Commerce Cloud
- Track email performance using Analytics
- Improve marketing agility, efficiency, and campaign performance
- Personalize engagement based on past purchases and shopper interactions
- Capture revenue from cart, search, or browse abandonments by implementing storefront behavior monitoring and behavioral email

- Connect Commerce Cloud and Marketing Cloud using existing REST APIs
- Enable one-way sharing of customer, catalog, and order data from B2C Commerce Cloud to Marketing Cloud

Related Content

← Review earlier steps in this solution.
- Personalized Marketing Recommendations Solution Workflow
- Design Considerations

→ Take the next steps in this implementation.
- Configurations

Configurations

Use these configurations to personalize marketing recommendations.

Enable Commerce Cloud Recommendations

This step is optional. Commerce Cloud includes its own recommendations. If you want only recommendations using email, skip this step.

Set Up the Marketing Cloud Connector

Configure how often to refresh the data in Marketing Cloud. Daily updates are typical for the Marketing Cloud data extension.

Implement and Customize the collect.js Code in Commerce Cloud

First, implement the collect.js tracking code in Commerce Cloud.

📝 Note: For this customization work, use the Marketing Cloud Connector reference implementation of collect.js. If needed, extend the collect.js implementation.

After completing the collect.js implementation, validate the setup and behavior tracking events.

Set Up Catalog Importing in Marketing Cloud

Use the Marketing Cloud reference implementation to import a catalog with many SKUs into Marketing Cloud using the SFTP import process. For SKU imports that require constant product updates during the day, such as flash sales, configure streaming updates in Marketing Cloud to incrementally import catalog updates.

Set Up Personalization Builder

Let the system gather data for at least 30 days to build robust shopper profiles. This data generates personalized shopper recommendations.

- Review Einstein Recommendations Prerequisites.
- Configure the Personalization Builder Catalog for Einstein Recommendations.
- Configure Einstein Email Recommendations.

Configure Email Templates

Set up email templates with the recommendations that come from Personalization Builder using dynamic content.

Use the content block functionality within Marketing Cloud to personalize each email with personalized recommendations.

Related Content

← Review earlier steps in this solution.

- Personalized Marketing Recommendations Solution Workflow
- Design Considerations
- Integration Reference Implementation

Keep Customers in the Loop with Transactional Email

Inform customers on the status of their orders through email while reducing call volume to your service centers. Increase storefront visits.

Get Started

Explore system architecture related to this solution.

- B2C Industry Blueprint
- B2C Reference Architecture
- B2C Solution Architectures

Take Trailhead modules related to this solution.

- Salesforce Solution Kits: Quick Look
- Customer 360 Guide for Retail: Quick Look
- Customer 360 Guides: Quick Look

This solution kit helps you:

- Build trust with your shoppers.
- Keep shoppers informed and reassured.
- Inform shoppers when their orders are in process and complete.
- Let shoppers track their purchase from order to delivery.
- Increase storefront visits.
- Give your shoppers a personalized experience when you connect Commerce Cloud and Marketing Cloud.

Required Products

- Commerce Cloud (SFRA or SiteGenesis)

- Marketing Cloud (Journey Builder and Email Studio)

Implement This Solution

Transactional Email Solution Workflow

Learn how data flows through the configurations to keep customers in the loop with transactional email.

Design Considerations

Keep these design considerations in mind when you keep customers in the loop with transactional email.

Integration Reference Implementation

Implementation reference implementations are developer enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns. Use the Marketing Cloud reference implementation for B2C Commerce to keep customers in the loop with transactional email.

Configurations

Use these configurations to keep customers in the loop with transactional email.

Transactional Email Solution Workflow

Learn how data flows through the configurations to keep customers in the loop with transactional email.

Workflow
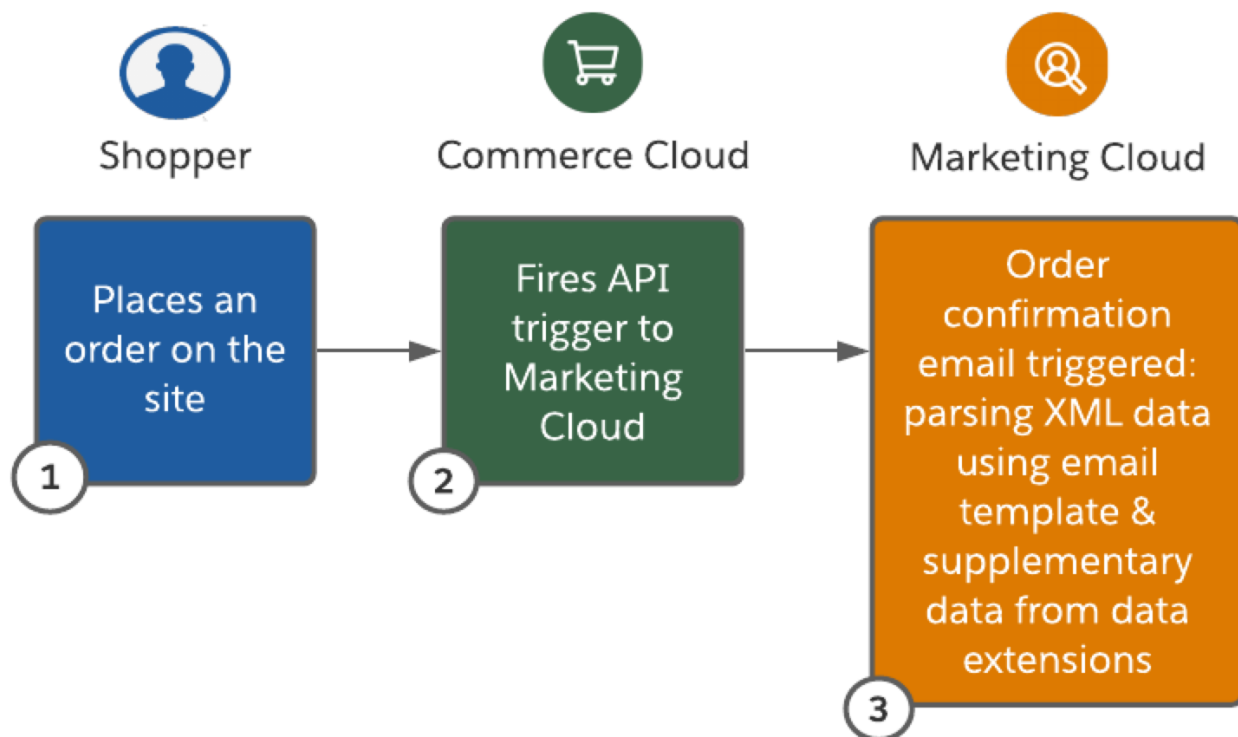
1. The shopper places an order on the site.
2. Commerce Cloud triggers an API to Marketing Cloud that contains the order data in XML format.

3. Marketing Cloud generates the order confirmation email using the transactional email template while parsing the XML data and supplementary data from custom data extensions.

Understand the Flow of Data
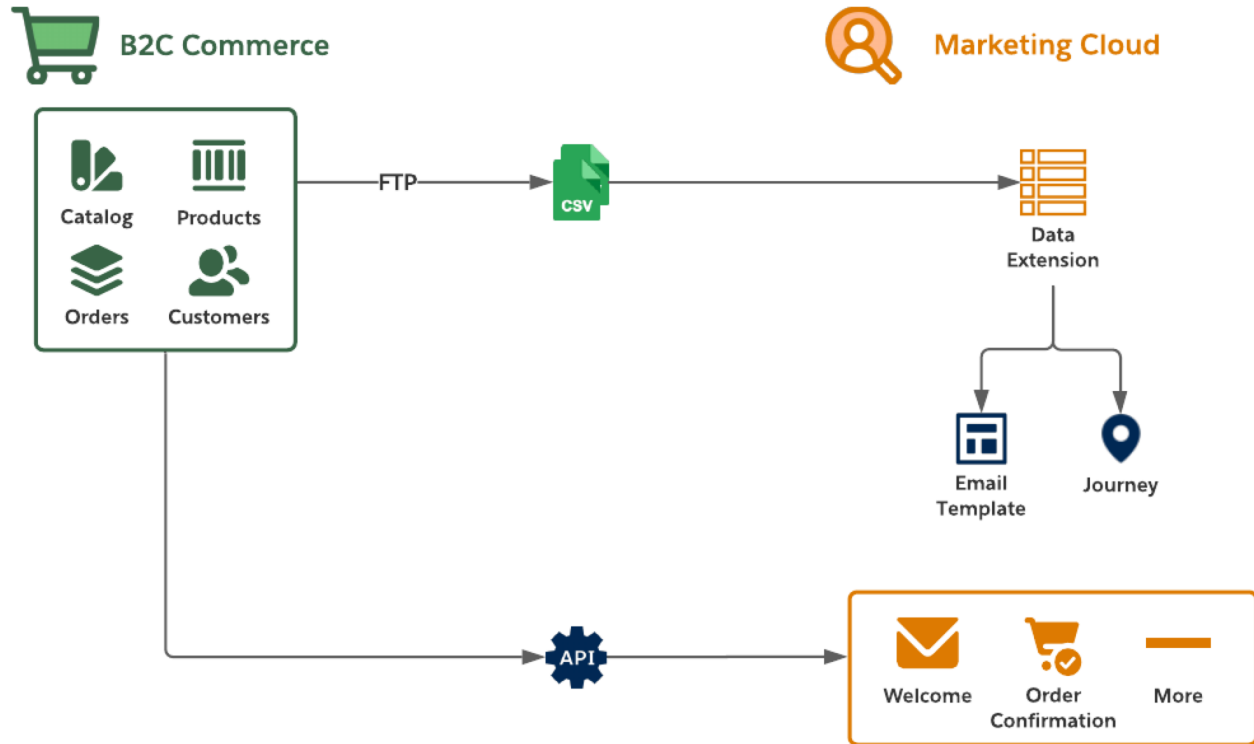
1. Collect the catalog, product, order, and customer data feeds from the B2C Commerce staging and production environments.

2. Move the data to the Marketing Cloud SFTP server and create import activities so that Marketing Cloud consumes it on a schedule via Automation Studio.

3. Use B2C Commerce data in Marketing Cloud via data extensions during the authoring of email templates, creation of journeys, and development of personalized product recommendations.

4. Extend the B2C Commerce storefront by replacing its email functions with the Marketing Cloud's trigger-send features.

5. Use the Marketing Cloud reference implementation customizations to trigger transactional email for common scenarios. These scenarios include Welcome Email, Order Confirmation, and Order Status Update Email.

Functionality Considerations

- The reference implementation enables email authoring using Marketing Cloud's Email Studio, rather than the developer storefront template model supported by B2C Commerce Enterprise.

- The reference implementation enables B2C Commerce to trigger Marketing Cloud to generate transactional email delivery.

- The reference implementation supports delivery of B2C Commerce-driven data feeds to Marketing Cloud through SFTP (customers, catalogs, and orders).

- Use data feeds that Marketing Cloud consumes to shape email content, including storefront product recommendations.

Performance Considerations

- Plan your Commerce Cloud data feed consumption to support expected volume and Marketing Cloud use cases.

- Limit data imported via the connector feed framework to 1 million rows per import. If your data volume exceeds 1 million rows, consider multiple imports.
- Use data extensions to import data into Marketing Cloud for personalization or segmentation.
- Avoid importing data into Marketing Cloud for "pre-processing" or "data-lake" activities.

Related Content

	Review this solution's use case and purpose.
	• Keep Customers in the Loop with Transactional Email on page 99

	Take the next steps in this implementation.
	• Design Considerations
	• Integration Reference Implementation
	• Configurations

Design Considerations

Keep these design considerations in mind when you keep customers in the loop with transactional email.

Catalogs

- Streaming updates isn't efficient for large numbers of product SKUs.
- Language, currency, multi-brand support, and inventory affect the catalog feed model.
- Extend the catalog feed model to support multiple languages, brands, and currencies.

Data Extensions

- Follow best practices for creating data extensions. To ensure that your data is efficiently stored and quickly retrieved, choose the correct data field types. Set appropriate field lengths. When no other option is available, use unbounded columns whose field lengths aren't set. Limit the total number of field lengths in a data extension to less than 4000 total characters.
- The order confirmation email template uses the supplemental data extension ShippingMethods to retrieve labels and descriptions for shipping methods. Seed this data extension with all supported Commerce Cloud storefront shipping methods.

Triggers for Order Confirmation

- Replace your legacy email delivery logic for order confirmation with the Marketing Cloud Connector reference implementation.
- Include the order details for the confirmation email in the hook message used to invoke the Marketing Cloud trigger.

Related Content

	Review earlier steps in this solution.
	• Transactional Email Solution Workflow

	Take the next steps in this implementation.
	• Integration Reference Implementation
	• Configurations

See Also

Configuration B2C Marketing

- B2C Custom Hooks Overview
- B2C Order.xsd Salesforce XML Schema
- B2C Marketing Cloud Reference Implementation: Documentation
- B2C Marketing Cloud Reference Implementation: Overview

Email, Marketing, and Streaming

- Einstein Email Recommendations
- Marketing Cloud SFTP Guide
- Stream Catalog Updates Through Collect Tracking Code

Integration Reference Implementation

Implementation reference implementations are developer enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns. Use the Marketing Cloud reference implementation for B2C Commerce to keep customers in the loop with transactional email.

After you sign in to GitHub, the Marketing Cloud reference implementation for B2C Commerce facilitates the platform customizations necessary to integrate Commerce Cloud and Marketing Cloud.

Before implementing, consider conducting an environmental audit with a Marketing Cloud representative to confirm that you meet the prerequisites for the use case.

Before implementing the configurations, sign in to GitHub and set up the Marketing Cloud reference implementation using the GitHub repository wiki instructions. Get started with Commerce API.

General Information About Reference Implementations

- Reference implementations are developer-enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns.
- Reference implementations support a core set of use cases that you can extend to support other customer-driven use cases.
- Reference implementations require customization and configuration in Marketing Cloud and B2C Commerce Cloud. The Commerce Cloud storefront requires customization as part of the integration.
- Implementation and validation require operational and administrative experience with Marketing Cloud.
- Plan your implementation as you would any other B2C Commerce Cloud feature by collecting requirements, capturing work tasks, and making task estimates.

What Your Company Can Do with This Reference Implementation

- Accelerate integration time to market for Commerce Cloud and Marketing Cloud
- Simplify and centralize email authoring and content management
- Trigger transactional email from Marketing Cloud through Commerce Cloud
- Track email performance using Marketing Cloud Analytics
- Improve marketing agility, efficiency, and campaign performance
- Personalize engagement based on past purchases and shopper interactions
- Connect Commerce Cloud and Marketing Cloud using REST APIs
- Enable one-way sharing of customer, catalog, and order data from B2C Commerce Cloud to Marketing Cloud

Related Content

Review earlier steps in this solution.

- Transactional Email Solution Workflow
- Design Considerations

Take the next steps in this implementation.

- Configurations

Configurations

Use these configurations to keep customers in the loop with transactional email.

Set Up SFTP in Marketing Cloud

- SFTP integrates the customer, catalog, content, and order data feeds from Commerce Cloud.
- Set up multiple export processes to support these and other Commerce Cloud data sets.
- Commerce Cloud data sets persist in Marketing Cloud through data extensions.
- For retailers, configure the data feeds in Commerce Cloud to deliver data to Marketing Cloud during periods of low traffic.

Configure Product Catalog Import in Marketing Cloud

- To ensure that the products represented in marketing communications align with your catalog definitions, regularly import the storefront catalog.
- Generate product recommendations from your catalogs.

Configure Email Templates in Marketing Cloud

- Configure email templates to use Commerce Cloud data for each supported template type.
- The Marketing Cloud reference implementation supports multiple transactional email templates beyond the order confirmation and status use-cases.
- Extend email templates to use product recommendations that Marketing Cloud Einstein generates.
- For more information on setting up personalized recommendations in email templates, review the Personalized Marketing Recommendation Solution Kit.

Set Up Triggers in Commerce Cloud

- Customize the storefront and replace B2C Commerce Cloud generated order confirmation logic with the triggered Send API call to Marketing Cloud. Follow the reference implementation standards.
- Implement SFRA.
- Implement SiteGenesis.

Related Content

Review earlier steps in this solution.

- Transactional Email Solution Workflow
- Design Considerations
- Integration Reference Implementation

Engage Customers with Conversational Commerce

Provide richer customer service and drive sales when you implement live agent chat or chatbots within B2C Commerce. Build brand loyalty, check order status, and offer extra assistance at the hands of service agents.
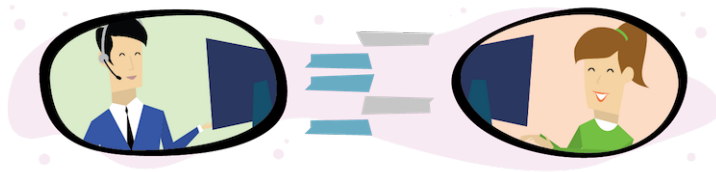
Get Started

Explore system architecture related to this solution.

- B2C Industry Blueprint
- B2C Reference Architecture
- B2C Solution Architectures

Take Trailhead modules related to this solution.

- Salesforce Solution Kits: Quick Look
- Customer 360 Guide for Retail: Quick Look
- Customer 360 Guides: Quick Look

This solution kit helps you:

- Engage customers at key points of their shopping experience.
- Give customers timely self-service help.
- Prevent cart abandonment via proactive chat.
- Increase the productivity and service quality of customer service agents.
- Exceed the customer service expectations of your customers.

Required Products

- Commerce Cloud (SFRA or SiteGenesis)
- Service Cloud

Recommended: B2C-CRM-Sync Integration Framework

Other Supported Use Cases

This solution kit provides guidance on how to implement live agent chat within B2C Commerce. The kit also explains how to support other use cases that the b2c-crm-sync facilitates, including letting agents order on behalf of storefront shoppers.

While the Conversational Commerce use cases in this solution kit don't require the b2c-crm-sync, it gives agents extended capabilities and provides integration patterns that support new service-driven use cases.

Review these recommendations for the two use cases: Live Agent Chat and Chatbot.

	Live Agent Chat (Human)	**Chatbot (Automated)**
Required Setup	Send Pre-Chat Variables	Send Pre-Chat Variables
Before Placing Order		
Add Discount to Basket (Coupon, Order Discount, Shipping Discount)	Via Order on Behalf (OOBO)	Via APIs
After Placing Order		
View Latest Order Status	Custom Implementation with OMS	Query Order Object in Core
Cancel Order Within Forgiveness Window	Via SFCC	Via APIs
Change the Order	Custom Implementation with OMS	Transfer to Agent
Answer Common Questions	Via Knowledge	Query Knowledge

Solution Architecture

Discover how use cases map to solutions with a visual illustration. See how recommended products integrate with back end systems and how data is passed between them when you engage customers with conversational commerce.

Conversational Commerce Solution Workflow

Learn how data flows through the configurations to engage customers with conversational commerce.

Design Considerations

Keep these design considerations in mind when you engage customers with conversational commerce.

Integration Reference Implementation

Reference implementations are developer enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns. Use the b2c-crm-sync to engage customers with conversational commerce.

Conversational Commerce Configurations

Use these configurations to engage customers with conversational commerce.

Solution Architecture

Discover how use cases map to solutions with a visual illustration. See how recommended products integrate with back end systems and how data is passed between them when you engage customers with conversational commerce.
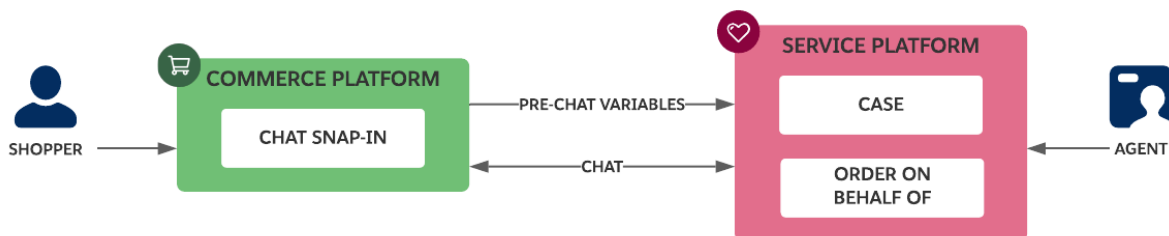
Related Content

Review this solution's use case and purpose.

- Engage Customers with Conversational Commerce on page 105

Take the next steps in this implementation.

- Conversational Commerce Solution Workflow
- Design Considerations
- Integration Reference Implementation
- Conversational Commerce Configurations

Conversational Commerce Solution Workflow

Learn how data flows through the configurations to engage customers with conversational commerce.

Chatbot Workflow
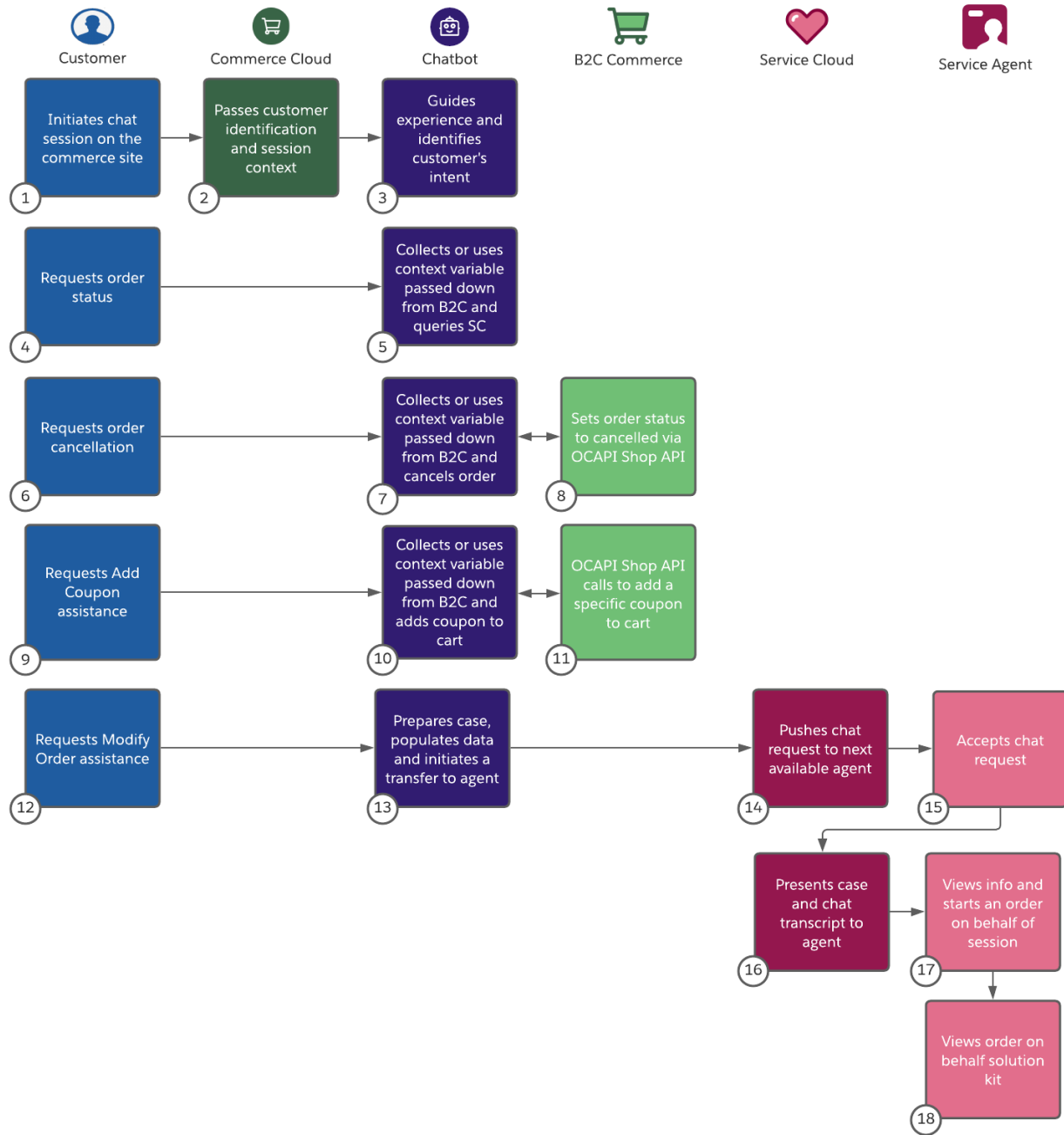
- A customer initiates a chat session on the store's commerce website. (1)
- Commerce Cloud passes the customer's identification and session context along to the chatbot. (2)
- The chatbot guides the customer's experience and identifies the customer's reason for engaging with the chatbot. (3)
- A customer requests an order status. (4)
- The chatbot collects the customer's information or uses context from Commerce Cloud and queries Service Cloud. (5)
- A customer requests an order cancellation. (6)

- The chatbot collects the customer's information or uses context from Commerce Cloud and cancels the order. (7)

- B2C commerce sets the order status to "canceled" via the Open Commerce API. (8)

- A customer requests assistance with Add Coupon. (9)

- The chatbot collects the customer's information or uses context from Commerce Cloud and adds the coupon to the customer's cart. (10)

- Open Commerce API calls to add a specific coupon to cart. (11)

- A customer requests assistance with modifying an order. (12)

- The chatbot prepares the case, populates the data, and places the chat request in queue. (13)

- Service Cloud pushes the customer's request to the next available agent. (14)

- The service agent accepts the customer's chat request. (15)

- Service Cloud presents the customer's case and chat transcript to the assigned agent. (16)

- The agent views all of the information the chatbot has provided and initiates an order on behalf of the session. (17)

- The service agent views the Order on Behalf as detailed in the Solution Kit (18).

Salesforce Chat Workflow
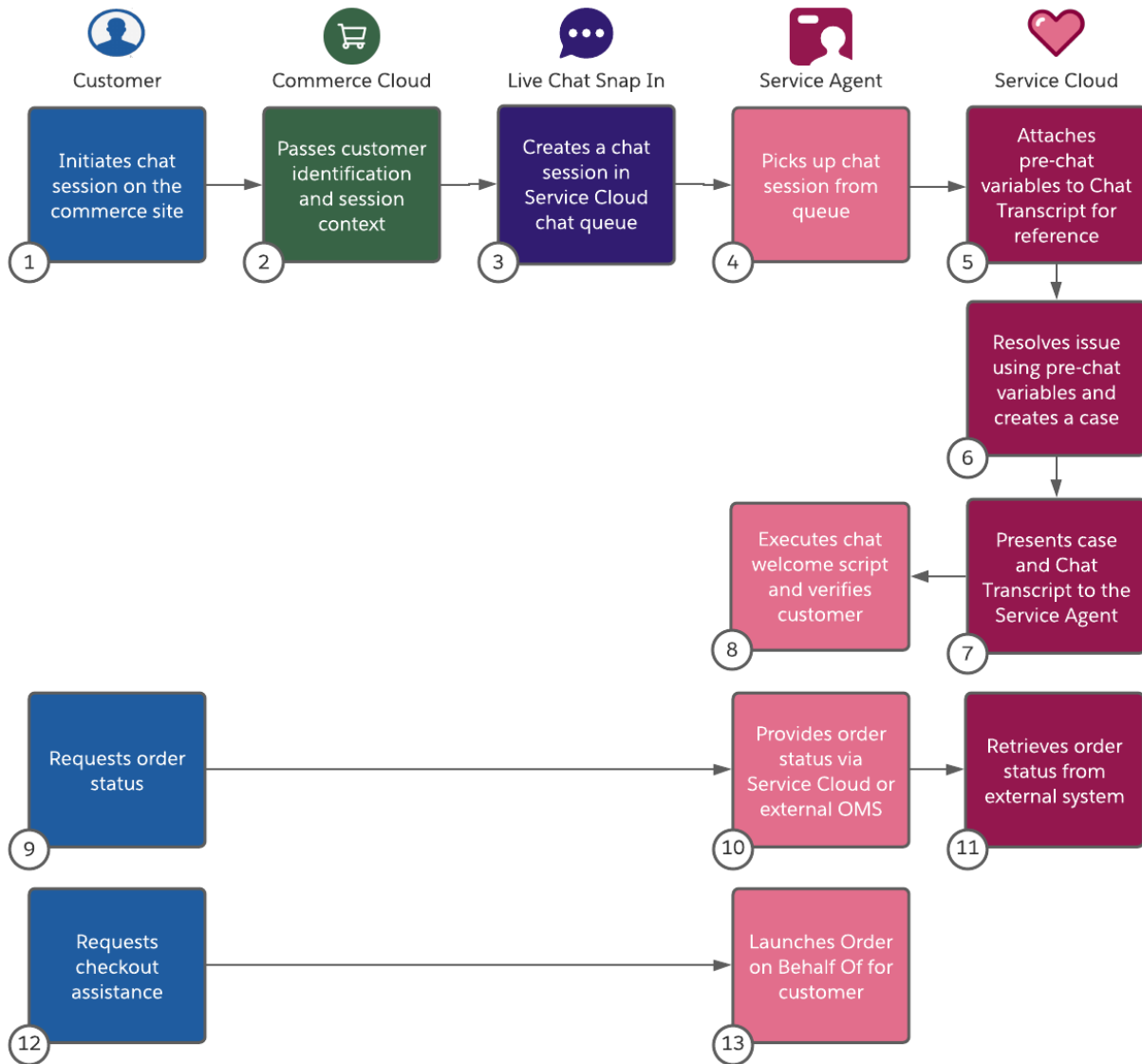
- A customer initiates a session on the store's commerce website. (1)
- Commerce Cloud passes the customer's identification and session context forward to the Live Chat Snap In. (2)
- The Live Chat Snap In creates a chat session in the Service Cloud chat queue. (3)
- The next available service agent picks up the chat session from the queue. (4)
- Service Cloud attaches the pre-chat variable to the Chat Transcript for reference. (5)
- Service Cloud then resolves the issue using the pre-chat variables and creates a case. (6)
- Service Cloud presents the case and Chat Transcript to the assigned service agent. (7)
- The service agent then executes the chat welcome script and verifies the customer. (8)
- A customer requests an order status. (9)
- The assigned service agent provides an order status via Service Cloud or an external OMS. (10)

- Service Cloud retrieves the order status from the external system. (11)
- A customer requests assistance with checkout. (12)
- The assigned service agent launches Order on Behalf Of the customer. (13)

Related Content

← Review earlier steps in this solution.
- Solution Architecture

→ Take the next steps in this implementation.
- Design Considerations
- Integration Reference Implementation
- Conversational Commerce Configurations

Design Considerations

Keep these design considerations in mind when you engage customers with conversational commerce.

Identify and Resolve Customers

- Get guidance on how to customize the pre-chat form for performing more advanced activities in the Service Cloud Chat Developer Guide. These activities include customer identification and automated record creation in Service Cloud.
- If you integrate B2C Commerce and Service Clouds via b2c-crm-sync, you can enable synchronization. Every shopper who registers or places an order via Guest Checkout has a corresponding contact or person account in the Salesforce Core Platform.
- Show Service Cloud how to identify and resolve the shopper's contact or person account. Extend the pre-chat form to use the shopper's B2C Commerce and Service Cloud identifiers. To perform this resolution, use the profile identifiers stored in the customer's B2C Commerce profile.
- Instruct Service Cloud to create a contact or person account representing the chat customer (if one was resolved) when you extend the pre-chat form. If using Person Accounts, specify the RecordTypeId representing a person account in the pre-chat form.

Provide Order Status and Cancel Orders for Customers

To process storefront orders and place them through a fulfillment workflow, B2C Commerce customers often use an order management system (OMS). In this scenario, integrate Service Cloud with the OMS to interact with orders.

Launch Proactive Chat

- Learn how to enable proactive chat invitations in the Web Chat Basics Trailhead module.
- Automate chat invitations by modifying the chat trigger to fire based on certain criteria. This criteria includes whether a customer remains on a web page for more than a specified amount of time or the activities a customer performs on a web page.
- To set variable triggers that support automated chat invitations, use JavaScript code. Customize the automated chat triggers. Monitor storefront session length time and create a chat invitation if a shopper has items in their cart but hasn't entered checkout in [x] minutes.

- Prevent shopping cart abandonment by triggering a chat invitation. Chat if a shopper enters the checkout process and doesn't complete the checkout in [x] minutes or spends more than [x] minutes of a specific section of checkout.

  📝 Note: Use your web analytics reporting to identify pages to target as proactive chat invitation points. Analytics reports identify pages to target, estimate shopper session length, and record page-visit durations of shoppers.

- Monitor customer behavior in checkout for activities that lead to abandonment (for example, clicks to the storefront home-page icon or footer links). To pre-empt checkout abandonment, initiate a chat invitation.

- Monitor the total value of the customer's shopping cart and customize the automated chat triggers. Initiate a chat invitation if the cart value exceeds a threshold value and the customer doesn't enter checkout within [x] minutes.

- Learn how to customize a chat invitation and create custom chat events to initiate chat invitations in the Embedded Service for Web Developer Guide.

OOBO for Authenticated Customers

- To include adding products to cart and applying coupons or discounts to a customer's basket, use order-on-behalf-of capabilities.

- Order-on-behalf-of via b2c-crm-sync is available for contacts and person accounts that represent registered B2C Commerce customer profiles.

- To include logic to resolve customers using their B2C Commerce profile identifiers, extend the pre-chat form. To create contact or person accounts using the B2C Commerce customer identifiers included in the pre-chat variables, extend the form.

- Service agents can click the Launch Shopping Cart button, which the Service Cloud Connector provides from the person account that represents the chat user. This button opens an agent shopping session with access to the chat user's shopping cart.

- Through this session, agents can adjust the customer's cart contents, apply coupons or promotions, or assist the customer through the shopping and checkout processes.

- To empower service agents to provide agent-only discounts via coupons, customize the shopping experience. This customization can include line item-level price breaks as part of their service capabilities to customers.

- Any changes that the agent makes to the customer's cart are visible to the customer with their next page request via the B2C Commerce storefront.

Chatbot Design

- To provide the best customer experience, build a contextual chatbot based on customer profile and shopping cart data. Bot Builder supports rules that send customers through different dialog flows for the personalized experience.

- Design the voice and tone of the bot to match the brand. The voice and tone provide consistent branding across the webstore and the chat channel.

- Use menu- and button-based navigation and NLP to identify customer intent. In the initial rollout of a chatbot, it's critical to have a menu that lists the bot capability. This menu helps set the right expectations for the customer, describes what the bot can do, and indicates when they transfer to a live agent.

- Build a transfer-to-agent flow in the bot as a fallback for anything the bot can't handle. Though technically not required, we recommend that you implement Agent Chat before launching a chatbot.

- Chatbot has unlimited capacity so it can run 24-7 if desired. If agents aren't working 24-7, build an offline support flow so that the chat session doesn't encounter a dead end.

- An offline support flow gathers more customer information, such as email, mobile number, and case creation. It can also notify customers that an agent will contact them during normal business hours.

- Chat may not respond when bot actions include long running processes that depend on external integrations. Consider multiple timeout limits when building integrations.

- Bot actions have a 10-second system timeout. Salesforce Platform allows for as many as 10 concurrent long-running processes. A long-running process is one that runs more than 5 seconds on the platform.
- Add a timeout of 3 seconds for each API integration to prevent bot actions from becoming a long-running process. This timeout leaves 2 seconds for the rest of the bot actions in the same running context.

Bot Interactions with Storefront Shopping Carts Via OCAPI

- Authenticate agent-driven shopping sessions using the customer/auth Shop API resource and connect them to registered B2C Commerce customers via the customer/{customerId}/auth resource.
- Interact with anonymous and registered customer shopping carts by accessing the customer's session through the sessions SHOP API resource. This resource uses the dwsid and dwsecuretoken values to identify the customer's session.
- Use the products SHOP API resource to add or remove products from the customer's shopping cart. Changes made to the cart are visible on the customer's next page request.
- Convert the customer's basket to an agent basket so that service agents can apply custom line-item, order, and shipping discounts.
- Use the basket price_adjustments SHOP API resource to apply custom line-item, order, and shipping discounts to the agent cart. These resources support custom discounts at each of these basket levels.
- Assign the customer to the agent shopping cart to complete the bot interaction (required for a new agent cart).
- Convert the agent basket to a storefront basket so that the agent's basket adjustments appear for the original storefront shopper. Do this conversion after assigning the customer to the agent shopping cart.

> ✏️ **Note:** Download b2c-crm-sync for working examples of the cart interactions outlined in this section of the solution kit. The supported scenarios include interactions with anonymous, agent, and registered carts.

Related Content

←	Review earlier steps in this solution.
	- Solution Architecture
	- Conversational Commerce Solution Workflow

→	Take the next steps in this implementation.
	- Integration Reference Implementation
	- Conversational Commerce Configurations

See Also

Commerce Cloud	- Commerce Cloud Supported Cookies
	- OCAPI Customer Authentication
	- OCAPI OAuth Authentication
	- OCAPI Usage Guidance
	- Open Commerce REST API: OCAPI Data API
	- Open Commerce REST API: OCAPI Shop API

Salesforce Chat	• Available Chat Features in Embedded Chat • Customize the Branding and Appearance of Your Chat Window • Customize the Offline Support Form • Customize the Pre-Chat Form • Service Cloud Channels • Service Cloud Chat Developer Guide • Set Up and Customize an Automated Invitation • Set Up and Use Quick Text • Set Up Chat with a Guided Setup Flow • Test Embedded Chat
Einstein Chatbots	• Add Prebuilt Dialogs and Customize Option Menu • Create a Dialog, Sub-Menu, and Dialog Group • Einstein Bots and Einstein Bots Cookbook • Learn About Einstein Bots • Learn the Prerequisites and Enable Einstein chatbots • Plan Your Bot Content • Prepare for Einstein Bots • Set Up an Einstein Bot • Understand Why chatbots Matter to the Contacts Center • Write Bot Conversations Using Variables and Entities

Integration Reference Implementation

Reference implementations are developer enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns. Use the b2c-crm-sync to engage customers with conversational commerce.

The b2c-crm-sync is an enablement solution designed by Salesforce Architects that facilitates the integration between Salesforce B2C Commerce Cloud and Service Cloud. The reference implementation provides a framework to integrate the clouds by using public REST APIs to share and sync data.

Before implementing, sign into GitHub and download b2c-crm-sync. Follow the installation instructions available from the repository ReadMe.md file. Are you a new Commerce Cloud customer or partner and don't have access to the GitHub repository? Get started with Commerce API.

General Information About Reference Implementations

- Reference implementations are developer-enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns.
- Reference implementations support a core set of use cases that you can extend to support other customer-driven use cases.
- Reference implementations require customization and configuration in Service Cloud and Commerce Cloud. The Commerce Cloud storefront requires customization as part of the integration.
- Implementation and validation require operational and administrative experience with Service Cloud.

- Plan your implementation as you would any other B2C Commerce Cloud feature by collecting requirements, capturing work tasks, and making task estimates.

What Your Company Can Do with This Reference Implementation

- Accelerate integration time to market for B2C Commerce and Service Cloud.
- Get a shared view of customers and order data between B2C Commerce and Service Cloud.
- Provide self-service through automated case creation from the storefront.
- Convert service interactions into cross-sell and up-sell opportunities through order on behalf of during agent-to-customer conversations.
- Support real-time, peer-to-peer data synchronization for customer and case data between B2C Commerce and Service Cloud.
- Customize the B2C Commerce and Service Cloud experiences by extending your use cases and implementing new ones.

Functionality Considerations

- Supports Accounts and Contacts or Person Accounts as the customer model in Service Cloud.
- Enables the synchronization of registered Commerce Cloud customer profile and address book data with associated Service Cloud Contacts or Person Accounts.
- Enables OOBO functionality for service agents from the customer detail displays in Service Cloud.
- Enables data synchronization between B2C Commerce and Service Cloud through REST Services exposed and used by the reference implementation.
- Extends the storefront to enable data synchronization with Service Cloud at strategic transaction points (customer registration, profile updates, and order placement).

Related Content

← Review earlier steps in this solution.
- Solution Architecture
- Conversational Commerce Solution Workflow
- Design Considerations

→ Take the next steps in this implementation.
- Conversational Commerce Configurations

Conversational Commerce Configurations

Use these configurations to engage customers with conversational commerce.

These configurations help you set up live agent chat in Service Cloud and enable the chat client in B2C Commerce for both Salesforce Chat and Einstein Bots.

Configure Service Cloud to Support Salesforce Chat

Get an introduction to configuring chat on the Salesforce platform when you take the Web Chat Basics module in Trailhead.

Completing this module gives you a testable instance of live agent chat. To implement Salesforce Chat via your B2C Commerce storefront, use the test snap-in chat page that you create when you work through this module.

Configure Einstein Chatbots to Support Self-Service

Trailhead contains several modules that educate developers on the benefits of artificial intelligence (AI) in customer service and how to configure, create, and customize Einstein chatbots.

Completing this module gives you a testable Einstein chatbot powered by your Service Cloud environment.

Define the Shopper Identification Properties

Both Salesforce Chat and Einstein Chatbots require customer identification through the chat experience. Define the B2C Commerce shopper identification properties captured via pre-chat variables. Use those properties to identify the customer, their session and basket, or the storefront page where they launched the chat experience.

B2C Commerce manages the shopper's storefront with cookie names and values, which represent anonymous shopper properties. To identify individual shopper sessions, obtain these properties from the customer's cookie values set by the B2C Commerce storefront.

Use the customer's session identifiers to inspect their shopping session via B2C Commerce's Open Commerce API (OCAPI). Obtain a session-grant via OCAPI using these dwsid and dwsecuretoken cookie values.

> 📝 **Note:** If you don't have dwsecuretoken in your browser. use the dwanonymous cookie for the DWSTID and DWSTValue properties. Otherwise, to authenticate against the shopping session, always use the dwsecuretoken cookie.

- DWSID - A cookie value that identifies the browser session.
- DWSTID - The site-specific identifier associates the dwsecuretoken or dwanonymous cookie value to the current storefront.
- DWSTValue - The token value for the dwsecuretoken or dwanonymous cookie. The dwsid cookie identifies and secures the customer's session through https.

Authenticated Shopper Properties represent the internal identifiers describing the customer's registered B2C Commerce customer and profile system objects. These properties exist as attributes on both objects within B2C Commerce.

> 📝 **Note:** To interact with and on behalf of the customer via both cloud's REST APIs, B2C Commerce and Service Cloud use these customer profile identifiers.

- CustomerNo - The storefront-assigned customer number that represents the shopper.
- CustomerID - The internal B2C Commerce identifier representing the shopper's customer profile.
- SFSC AccountID - The AccountID mapped to the Service Cloud PersonAccount associated with the B2C Commerce customer profile.
- SFSC ContactID - The PersonContactID mapped to the Service Cloud PersonAccount or the ContactID mapped to the Service Cloud Contact associated with the B2C Commerce customer profile.

Shopper Session Properties represent the shopping session properties describing the session context, duration, and page from which the chat launched. These properties calculate at the time the pre-chat form renders.

> 📝 **Note:** To understand the context of the user and their shopping experience, use these shopper session properties.

- IsLoggedIn - Indicates whether the shopper was logged and authenticated when the live agent chat session launched.
- PagePipeline - Describes the current storefront pipeline from which the live agent chat session launched.
- PageUrl - Represents the customer-facing storefront page URL from which the live agent chat session launched.
- BasketID - Represents the internal B2C Commerce platform identifier for the customer's basket.
- TimeInSession - Represents the amount of time the shopper is in their B2C Commerce storefront session.

Extend the Service Cloud Chat Transcript Object

Include fields representing the defined B2C Commerce shopper identifiers when you extend the ChatTranscript object in Service Cloud. To capture the shopper identifiers for each submitted B2C Commerce pre-chat variable, use ChatTranscript fields.

- From Service Cloud Setup, open the Object Manager.
- Find the Chat Transcript and select the Fields and Relationships menu option.
- Add each of the identified shopper identity properties to the ChatTranscript object as custom fields.
- Note the field labels and field names that you created on the ChatTranscript object. Map these fields to the pre-chat variables through their API names.

Extend the Chatbot Context to Include B2C Commerce Variables

Include chat transcript fields representing the defined B2C Commerce shopper identifiers when you extend the list of context variables in Bot Builder. For detailed steps, see Get Web Context in the Einstein Bot Cookbook.

- Download the Bot Metadata in XML.
- Add the defined shopper identifier fields to the <contextVariables> section.
- Update the Bot Metadata with modified XML.

Implement Order Actions in Bots

Bot actions build dialogs in Bot Builder for the conversation experience. They also return the query results or execute the command from the bot conversation with customers. Learn about the two types of Order Actions from an "on/off" platform perspective.

- To query synchronized data on core (such as checking order status, building Flow, and SOQL query via Apex), return the result to the dialog.
- To read off platform data or perform any update, use OCAPI API. To consume OCAPI REST endpoints, for example, Cancel an Order, create Apex Bot Actions.

Extend B2C Commerce to Manage the Chat Experience

Implement the Salesforce chat experience via a B2C Commerce storefront. To manage the availability of the chat experience in B2C Commerce, put controls in place.

> 📋 Note: To manage the live agent chat configuration values and control switches, use Custom Site Preferences and preference groups.

- To organize all site preferences for managing the live agent chat experience, create a site preference group named "Chat Configuration.".
- To enable or hide the live agent pre-chat web form, create a site preference that manages the rendering of the live agent chat experience via the storefront.
- To maintain a list of storefront pages that exclude chat, create a site preference.

Extend the Storefront to Render the Chat Experience

With the previous steps finished, you can now render a branded chat experience when you extend the storefront from within the B2C Commerce storefront.

- Create a B2C Commerce script that collects pre-chat variables by inspecting a customer's session and profile before rendering the pre-chat snap-in.
- Create site preferences that abstract configuration settings of the snap-in and Service Cloud environment. These preferences enable environment-specific configurations instead of sharing one configuration among all environments.

- To render the pre-chat form variables, create a B2C Commerce-rendering template. As a starting point, use the test pre-chat snap-in page.
- Implement the chat snap-in as a javascript file that populates the pre-chat variables on page-load. To implement this pattern, publish the pre-chat variables via the rendering template and invoke chat on page initialization.
- Embed any custom styling for branding the pre-chat snap-in in an external .css file. Avoid rendering style-sheet definitions from within the rendering template.
- To render the pre-chat variables and configuration settings, extend the storefront footer template to include the logic. Invoke the snap-in initializer when the page initializes.
- Confirm that the B2C Commerce platform doesn't cache the pre-chat snap-in rendering template. Avoid caching this template because pre-chat variables are shopper-specific.
- Layer conditional logic that prevents the pre-chat snap-in from rendering within the storefront based on the configuration of live agent-specific custom site preferences.

Extend the Agent Console to Include Starting Point for Order on Behalf Flow

- Extend the Order on Behalf Of flow to retrieve customer identification credentials from the chat transcript.
- Create an agent-driven shopping session for registered B2C Commerce customers that launch chat when you use the b2c-crm-sync's agent authentication logic.

Test the Chat Experience

Verify that the chat experience works as designed across B2C Commerce and Service Cloud.

- Get an agent who belongs to the chat destination queue to log in from the Service Console and set the Omni status to available.
- Watch the embedded chat button in B2C Commerce change from "not available" to "available." This change verifies that the correct chat button is set on the store front.
- Verify that clicking the chat button launches the pre-chat form and a chat session.
- Disable the rendering of the pre-chat form within B2C Commerce using the chat site preferences, and verify that it doesn't appear in the footer. To continue the test, re-enable the rendering of the pre-chat form.
- Verify that the agent receives the Omni notification as the chat request enters the queue. Confirm that there aren't many other tests running that take away the agent's time.
- Verify that a chat session appears in the Service Console as the agent accepts the chat request.
- Within Service Cloud, verify that the anonymous and authenticated shopper identification properties appear on the page layout and chat transcript for each accepted chat session.
- Within Service Cloud, verify that each chat transcript contains the variables included in the pre-chat form. Use these variables to interact with the customer's session.
- Verify that agents can launch the OOBO process starting in Service Cloud.

Test the Bot Experience Across B2C Commerce and Service Cloud

Always start the test by disabling the bot. Follow the previous section's steps to implement live agent chat as part of the overall bot solution.

- Enable the bot and deploy it to the chat channel. Verify that the Embedded Chat button in B2C Commerce is still available, even if the agents are offline. This action confirms that the bot deploys from the correct chat button with unlimited capacity.
- Verify that clicking the chat button launches the pre-chat form in B2C Commerce and a chat session between the customer and the bot.

- Verify that the bot receives the correct context data by executing the entire end to end test or displaying the context value in a temporary dialog.
- Verify all bot actions by executing entire order flows. Verify that the integration works by assessing the return value from OCAPI calls. Verify that the order status changed in B2C Commerce for an order update.
- Verify the "Bot to Agent" transfer use case with an agent who logs in to Service Cloud Omni Channel. To continue the chat session with the customer, have the agent accept the chat transfer request.
- Verify that agents can review previous conversations between the bot and customer. Verify that all other data points that bots capture are correctly written to the Transcript or Case fields. Make these fields available to agents.

Related Content

Review earlier steps in this solution.

- Solution Architecture
- Conversational Commerce Solution Workflow
- Design Considerations
- Integration Reference Implementation

Implement Seamless Cross-Cloud Identity

Unify customer data with a single identity for each customer across your ecommerce sites and your communities. Enable one identity and give the customer visibility through the entire product catalog.

Get Started

Explore system architecture related to this solution.

- B2C Industry Blueprint
- B2C Reference Architecture
- B2C Solution Architectures

Take Trailhead modules related to this solution.

- Salesforce Solution Kits: Quick Look
- Customer 360 Guide for Retail: Quick Look
- Customer 360 Guides: Quick Look

This solution kit helps you:

- Enable one identity and log in across Commerce Cloud and Experience Cloud.
- Transfer the customer to the ecommerce site without having to log in with different credentials.
- Give the customer visibility through the entire product catalog and complete orders.
- Provide better customer experience.

Required Products

Product Pre-Requisites

- Experience Cloud
- Salesforce Identity
- Commerce Cloud Digital

License Requirement

- Experience Cloud and Salesforce Identity

Implement This Solution

Solution Architecture

Discover how use cases map to solutions with a visual illustration. See how recommended products integrate with back end systems and how data is passed between them when you implement seamless cross-cloud identity.

Seamless Identity Solution Workflow

Learn how data flows through the configurations to implement seamless cross-cloud identity.

Design Considerations

Keep these design considerations in mind when you implement seamless cross-cloud identity.

Configurations

Use these configurations to implement seamless cross-cloud identity.

Solution Architecture

Discover how use cases map to solutions with a visual illustration. See how recommended products integrate with back end systems and how data is passed between them when you implement seamless cross-cloud identity.
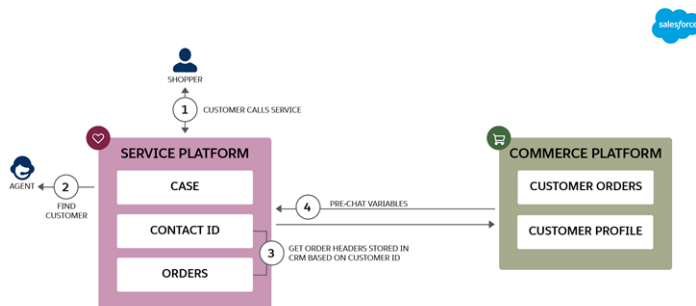
Related Content

	Review this solution's use case and purpose.
	• Implement Seamless Cross-Cloud Identity on page 119

	Take the next steps in this implementation.
	• Seamless Identity Solution Workflow
	• Design Considerations
	• Configurations

Seamless Identity Solution Workflow

Learn how data flows through the configurations to implement seamless cross-cloud identity.

Workflow
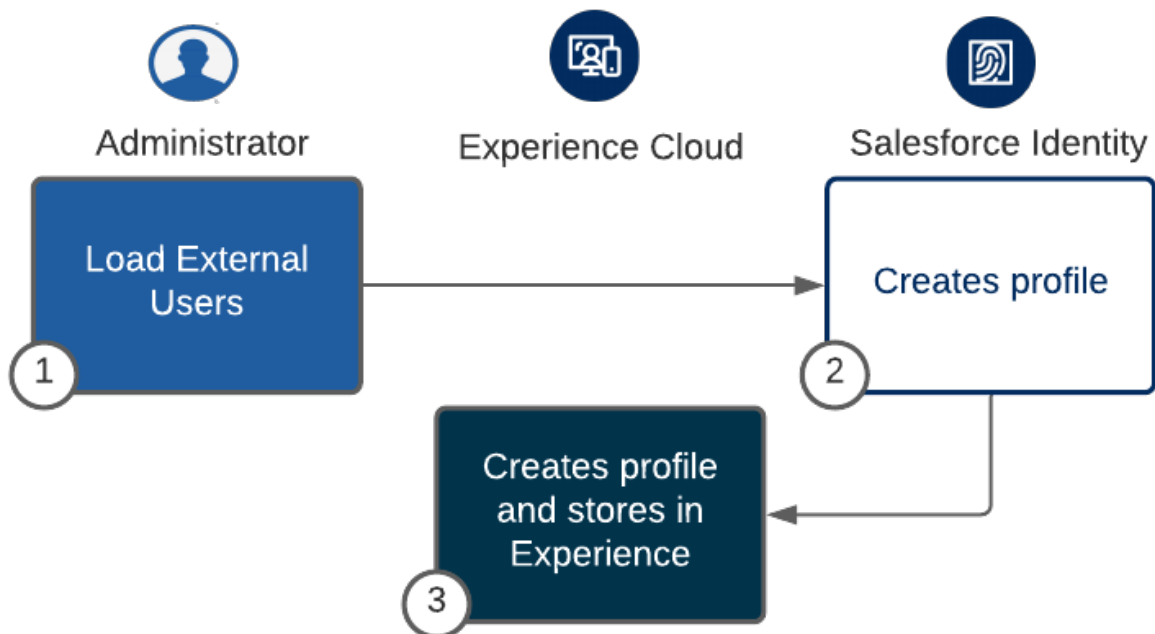
1. The customer requests to create a profile.
2. The customer's profile is created in Salesforce Identity.
3. The customer's profile is created in the Salesforce Community.
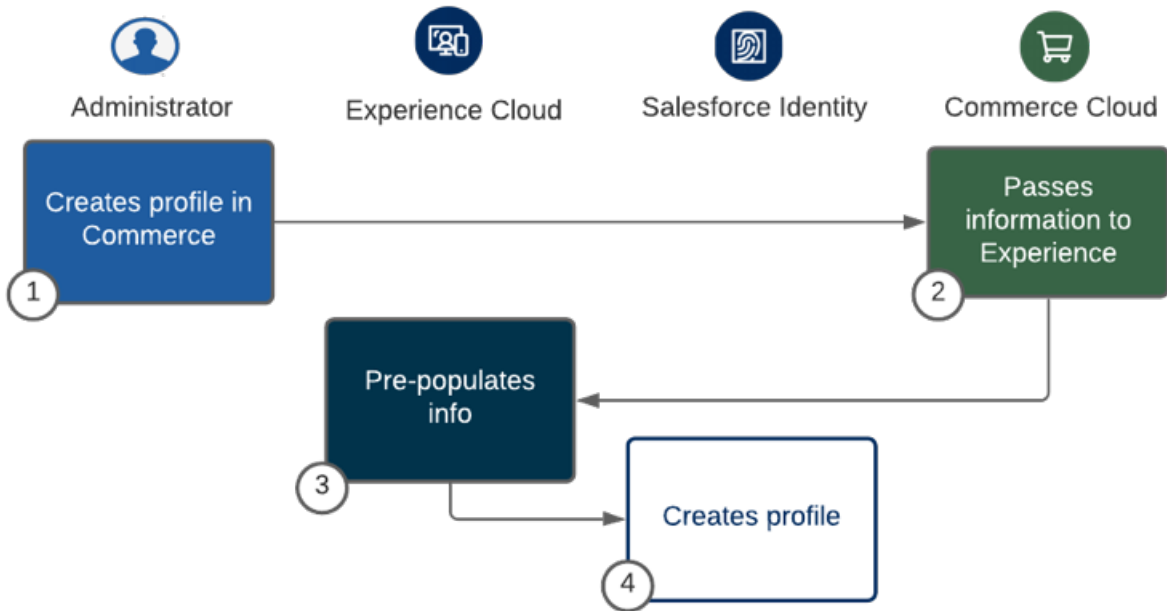
1. The customer requests to create a profile.

2. The customer's profile is created in B2B Commerce.

3. The customer's profile is created in the Salesforce Community.
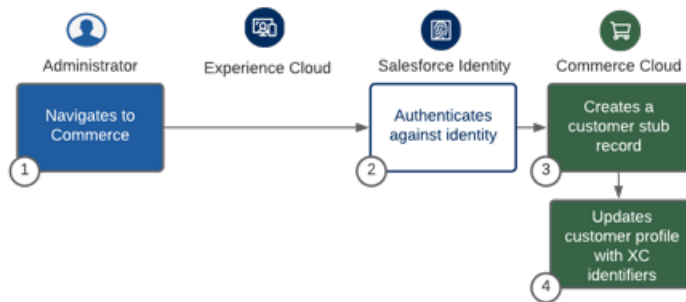
1. A customer who has previously created a profile in Salesforce Identity visits a storefront.

2. The customer logs in. They're authenticated by Salesforce Identity.

3. A stub profile is created in B2B Commerce.

4. B2B Commerce updates the customer's profile.

Related Content

Review earlier steps in this solution.

• Solution Architecture

→ Take the next steps in this implementation.

- Design Considerations
- Configurations

Design Considerations

Keep these design considerations in mind when you implement seamless cross-cloud identity.

Maintain One Source of Customer Information for Core and Primary Profile Information

- To minimize synchronization and migration of customer profile data, set up the primary profile in Communities.
- Establish one source for customer profiles that all integrated environments can use.
- You can pull profile information (first names, last names, and email addresses) from Experience sites via REST into a Commerce Experience. As you make profile changes in Experience Cloud, you can push changes to Commerce Cloud if a use case requires them.
- Architect a commerce experience so that you don't edit in Commerce Cloud. You manage profiles in Communities.

Maintain Customer-Specific Profile Data That's Accessible Across Commerce Cloud and Experience Cloud Sites

Access profile and customer shopping data from Commerce Cloud and Experience sites via their individual REST APIs.

Experience Cloud is the system of record for customer profile data, which includes:

- Individual Profile
- Authentication Credentials

Commerce Cloud is the system of record for customer shopping data, which includes:

- Address Book
- Payment Information
- Wishlists and Product Lists

Avoid Syncing Customer Profiles Across Commerce Cloud and Experience Sites

Synchronization and replication of customer data across Commerce Cloud and Experience sites requires custom integration. The ongoing maintenance of this integration can be costly. Ideally, a cross-cloud profile management solution isn't dependent on this capability.

If a user changes profile data, we recommend:

- Name - Store in Experience Cloud, which Commerce Cloud references
- Address - Update to Commerce Cloud
- Email - Store in Experience Cloud, which Commerce Cloud references

Data Migration

When importing data across multiple systems, maintain the profile creation and modification workflows within every cloud. Confirm that every profile within Commerce Cloud and Experience Cloud includes the relevant cross-cloud identifiers.

Be aware of these considerations:

- Currently, no automated process or migration framework can facilitate customer data imports and migration between Commerce Cloud and Communities or Service Cloud.
- Avoid individual record migration strategies when using REST API-based migration. The required cycle time to execute these strategies may not meet customer expectations. To export data, use the bulk import and export capabilities of both platforms. Reconcile cross-cloud unique identifier mappings, then import the data again.

- Export customer data for Experience Cloud via Business Manager in its native XML format. After you export it, migrate the XML data to an external database to facilitate profile remediation.
- Export customer data for Experience Cloud via the Salesforce Bulk API. After you export it, migrate the customer data to an external database to facilitate profile mediation.

Track Experience Cloud Authentication in Commerce Cloud with an Embedded Login

When a customer authenticates via Experience Cloud but hasn't authenticated via Commerce Cloud, evaluate the value of an embedded login.

When a user clicks the button and enters credentials in the login form, Salesforce authenticates the user. Salesforce checks the connected app to determine the type of access token to grant.

Salesforce sends the access token to the callback.

The callback uses the access token to pull the user's information from Salesforce and cache it locally.

The onlogin function determines which information to display to the user.

If the website requires ongoing interaction with Salesforce after authentication, the connected app maintains a connection between the web page and the Salesforce Experience site.

Retrieve Commerce Cloud Data from Experience Cloud Using Open Commerce APIs

Communities doesn't use all Commerce Cloud data objects (for example, wish lists, product lists, and payment information). Every Experience site user has a profile that lives in Commerce Cloud. The Open Commerce API accesses and manages this data.

Data Migration Strategy

When importing data across multiple systems, maintain profile creation and modification workflows within every cloud. That way, you include the relevant cross-cloud identifiers in every profile.

Be aware of these considerations.

- Salesforce doesn't yet offer automated processes or migration frameworks to facilitate customer data imports and migration between Commerce Cloud and Salesforce Experience sites or Service Cloud.
- Avoid individual record migration strategies when using REST API-based migration. The cycle time required to execute these strategies might not meet customer expectations. To export data, use the bulk import and export capabilities in Commerce Cloud and Experience Cloud. Reconcile cross-cloud unique identifier mappings, then import the data again.
- Export customer data for Experience Cloud using Business Manager in its native XML format. After you export it, migrate the XML data to an external database to facilitate profile remediation.
- Export customer data for Experience Cloud using the Salesforce Bulk API. After you export it, migrate the customer data to an external database to facilitate profile mediation.

The type of migration you perform impacts mediation. The implementation and cloud products you select affect the customer profile mediation and migration approach.

Profile mediation requires you to:

- Confirm whether you have customer profile representation in Experience Cloud and Service Cloud. If so, retrieve the UserID, PersonAccount AccountID, and ContactID. Decorate the Commerce Cloud profile with this data.
- Set up the PersonAccount with the Commerce Cloud Login, CustomerNo, and internal CustomerID.

Related Content

Review earlier steps in this solution.
- Solution Architecture

- • Seamless Identity Solution Workflow

→ Take the next steps in this implementation.

- • Configurations

See Also

- • Experience Cloud Sites as an Identity Provider (requires Commerce Cloud XChange account)
- • Configuring and Implementing OAuth2 Providers
- • Create a Branded Login Page
- • How to Implement Embedded Login

Experience Cloud Trailhead

- • Experience Cloud Basics
- • Engage with Your Customers
- • Engage with Your Employees
- • Engage with Your Partners
- • Get Started with Experience Cloud

Identity Trailhead

- • Connect to Individual Customers
- • Create a Self-Registration Page
- • Customize Your Login Process with My Domain
- • Get to Know Salesforce Identity
- • Get to Know Salesforce Identity Users
- • Identity Basics
- • Identity for Customers
- • Learn the Language of Identity
- • Prepare Your Org for Salesforce Customer Identity
- • Secure Your Users' Identity
- • Set Up a Experience Cloud for Salesforce Customer Identity
- • Set Up Single Sign-On for Your Internal Users
- • Set Up Social Sign-On
- • User Authentication
- • Use Salesforce Identity Beyond Your Internal Org

Configurations

Use these configurations to implement seamless cross-cloud identity.

Salesforce Experience Cloud Setup

Use the person or contact account to set up Experience Cloud members.

- The Commerce Cloud to Service Cloud connector supports person accounts out-of-the-box. Contact accounts require some customization.

Store the customer's core profile information in Experience Cloud.

- Customers register their profile through communities.
- When a customer chooses to register from within Commerce Cloud, a redirect sends them to the Experience Cloud registration form. They do not see registration capability in Commerce Cloud.
- The Experience Cloud registration process creates the Experience Cloud user profile.
- Upon registration, Experience Cloud invokes a remote OAuth2 authentication request to Commerce Cloud which creates the externally authenticated profile.

  If Marketing Cloud is not going to be part of the use case, use Contactless Users as an Option.

- If you implement Customer 360 Data Manager, use the contact-specific record to authenticate with Commerce Cloud.

Salesforce Commerce Cloud Setup

Customers authenticate to Communities and Commerce Cloud via Salesforce Identity.

- Configure Salesforce Identity as an OAuth2 provider within Commerce Cloud.
- This setup uses a common login experience to authenticate against Commerce Cloud and Experience Cloud.
- When an authenticated customer visits the commerce experience, they authenticate via OAuth2 integration seamlessly without requesting credentials.

Commerce Cloud maintains a stub and shadow record that represents the customer.

- When a customer authenticates for the first time via OAuth2, it creates an external profile within Commerce Cloud. That profile represents the local Commerce Cloud profile for the customer.

Cross-cloud identifiers decorate customer profiles.

- Commerce Cloud includes the Experience Cloud UserID and PersonAccount Account/ContactID.
- Experience Cloud includes the Commerce Cloud CustomerNo, Login, and Internal CustomerID.

When authenticated customers visit the commerce experience, they authenticate via OAuth2 integration without having to request credentials.

- If the number of users is larger than 10 million, or greater than 1,000 logins per minute, confirm performance considerations with Salesforce Customer Support.

Implement OAuth2 Integration Between Experience Cloud and Commerce Cloud Via Salesforce Identity

Establish Communities as the Commerce Cloud identity provider and enable Commerce Cloud customers to authenticate against their Experience site customer profile.

In this model:

- Communities serve as the master for customer profile information.
- Commerce Cloud configures Communities as a trusted OAuth2 provider that it authenticates against.
- Customers register their profiles via Communities, then authenticate the commerce experience via OAuth2.
- The OAuth2 authentication enables the creation of a Commerce Cloud profile which is linked to the Experience site profile via the OAuth2 provided identifier.
- OAuth2 handoffs across both experiences handle seamless authenticated access between Commerce Cloud and Experience Cloud sites.
- Learn from our best practices for creating a branded login experience.

Set up Trusted System Auth in Commerce Cloud as part of the Identity and Commerce Cloud integration.

This new API is for Salesforce customers who store Commerce Cloud passwords in external systems.

The trusted auth service is specifically for system-to-system API communication. It creates a session that doesn't require a user name or password. That's because the Commerce Cloud and Communities systems trust each other.

Do not use this in place of authentication. You can get information from the customer number, but not authentication.

- This API endpoint lets customers with external IDP profiles manage their data from an external system. It uses the Commerce Cloud SHOP API and scopes the access to their data.

Related Content

Review earlier steps in this solution.
- Solution Architecture
- Seamless Identity Solution Workflow
- Design Considerations

Explore Cross-Cloud Engagement Data Models

Improve customer loyalty by establishing a common profile for each customer across Marketing Cloud, B2C Commerce, and core platform clouds. Determine the best system of record for each type of customer data to take advantage of out-of-the-box cloud integrations.

Get Started

Explore system architecture related to this solution.
- B2C Industry Blueprint
- B2C Reference Architecture
- B2C Solution Architectures

Take Trailhead modules related to this solution.
- Salesforce Solution Kits: Quick Look
- Customer 360 Guide for Retail: Quick Look
- Customer 360 Guides: Quick Look

The Explore Cross-Cloud Engagement Data Models solution kit helps you:

- Explore concepts for modeling data on the platform.
- Map customer business requirements and definitions to product capabilities.

- Optimize your cross-cloud implementations to achieve a 360-degree view of your customers.

Establishing the best systems of record and data integration patterns for your organization helps you:

- Apply best-in-class marketing tools for commerce transactional messaging.
- Surface email tracking and engagement views for customer service agents.

Required Products

- Commerce Cloud (SFRA or SiteGenesis)
- Marketing Cloud Enterprise 2.0
- Sales Cloud, Service Cloud, or Experience Cloud
- Marketing Cloud Connect

Optional Products

- Salesforce Privacy Center
- Data Cloud
- Mulesoft

Implement This Solution

Understand Salesforce Systems of Record

Optimize your cross-cloud integrations by understanding which cloud is the ideal system of record for which piece of data.

Integrate Service Cloud, Marketing Cloud, and Commerce Cloud with Integration Reference Implementations

Reference implementations allow actions to be made in one cloud based on activity in another cloud.

Understand the Flow of Data

Marketing Cloud, Salesforce B2C Commerce, and Service Cloud can be connected both with Connectors and other API-based integrations.

Build a Common B2C Person Model

Salesforce lets you build a model of a person based on person accounts, on accounts and contacts together, or on a combination of accounts, contacts, and person accounts.

Use Person Model Considerations

Many objects and record types in Sales Cloud and Service Cloud include data to define people. Each of these objects has a slightly different primary purpose.

Understand Salesforce Systems of Record

Optimize your cross-cloud integrations by understanding which cloud is the ideal system of record for which piece of data.

In Salesforce, each cloud contains information about customers, but the information can differ between clouds. Determining the correct system of record for each piece of data is an important step to building highly functional cross-cloud solutions.

We recommend storing primary attributes about your customer in a core platform cloud, such as Service Cloud or Sales Cloud. Experience Cloud is also a possibility.

When Should a System Be Authoritative?

Consider these recommendations for the role of each cloud when establishing data source authority in your multi-cloud implementations.

Sales Cloud, Service Cloud, and Experience Cloud

- Primary person attributes, such as name, address, birthday, phone, and email

- Consent and compliance preferences

- Case management information, including transactions, history, and sentiment

- Recency snapshot for orders and engagement

- Subscription preference information across all channels

- Order history

Marketing Cloud

- Lifetime engagement tracking and history

- Suppression lists

- Subscription preferences

- Other data for personalization or segmentation

- Customer journey flow

- Counsel and compliance preferences

B2C Commerce

- Ecommerce transactions, including order records

- Customer product affinity

- Customer group membership aligned with ecommerce strategies

- Promotion eligibility

Mulesoft

Mulesoft provides a widely used integration platform for connecting applications, data, and devices in the cloud and on the premises. Mulesoft also provides a powerful tool to transform data with DataWeave. Discover and use prebuilt assets from the MuleSoft ecosystem or use Mulesoft's Anypoint Exchange to save, share, and reuse internal best practices. MuleSoft Accelerator for Retail includes pre-built APIs, connectors, integration templates, and reference architecture to enable retail IT teams to jumpstart digital transformation initiatives.

Heroku

While Heroku isn't a system of record, it can tightly integrate with core platform clouds such as Sales Cloud and Service Cloud. Heroku can aggregate data such as lifetime and historic records from several source systems when building customer applications at scale. Use cases include data lakes, pre-processing, and transforming records for other clouds. As a result, Heroku as a platform can *host* various systems of records.

Related Content

← Review this solution's use case and purpose.

- Explore Cross-Cloud Engagement Data Models on page 127

→ Take the next steps in this implementation.

- Integrate Service Cloud, Marketing Cloud, and Commerce Cloud with Integration Reference Implementations
- Understand the Flow of Data

Integrate Service Cloud, Marketing Cloud, and Commerce Cloud with Integration Reference Implementations

Reference implementations allow actions to be made in one cloud based on activity in another cloud.

To integrate these clouds, rely on the contact record ID as a common key.

General Information about Integration Reference Implementations

- Plan your implementation as you would any other B2C Commerce feature by collecting requirements, capturing work tasks, and making task estimates.
- The reference implementations provide reusable code to accelerate point-to-point integrations between B2C Commerce and Marketing Cloud or Service Cloud.
- In general, don't use the b2c-crm-sync reference implementation as a way to initially load the data.
- To ensure back and forth data flows, pay attention to implementation considerations around primary keys between clouds. Marketing Cloud Connect requires the Contact ID in Service Cloud to be the primary subscriber and contact key.
- Reference implementations are developer-enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns.
- Reference implementations support a core set of use cases that can extend to support other customer-driven use cases.
- Reference implementations require customization and configuration in Marketing Cloud and B2C Commerce. The B2C Commerce storefront requires customization as part of the integration.
- Implementation and validation require operational and administrative experience with Marketing Cloud.

Primary IDs for People

Out-of-the-box, point-to-point cross-cloud integrations:

- Use the Sales Cloud and Service Cloud contact record ID as the primary ID across the Salesforce platform.
- Marketing Cloud has a contact key in Contact Builder designed to be the cross-channel customer ID. The customer creates this ID whenever they define an audience. It happens when they configure data synchronization in Marketing Cloud Connect or use Journey Builder integrations with Sales Cloud or Service Cloud.
- Email Studio (email) and Mobile Connect (SMS) register subscriber keys for their respective channels. Those applications use contact keys and subscriber keys for subscription management and identifying contacts for consent and compliance.
- In B2C Commerce, CustomerID is the system-generated ID for a customer, whereas Customer.Profile.customerNo is the number that identifies customers.

Key considerations:

- Avoid using email addresses, SMS, or other channel addresses as the contact key in Marketing Cloud.
- To simplify consent, compliance, and the General Data Protection Regulation (GDPR) logical model, use a Salesforce record ID as a single unique identifier. This identifier applies across channels and clouds.
- Marketing Cloud Connect uses the contact record ID from Sales Cloud or Service Cloud to return email tracking data back into CRM.
- Set up the B2C Commerce Customer record with the Salesforce ContactID. The b2c-crm-sync reference implementation includes built-in patterns to help with this process.
- Using a Salesforce contact record ID simplifies integration with Experience Cloud and B2C Commerce.
- If your system doesn't require Marketing Cloud Connect functionality, you can use an external customer ID across all clouds.

Related Content

Review earlier steps in this solution.

- Understand Salesforce Systems of Record

Take the next steps in this implementation.

- Understand the Flow of Data
- Build a Common B2C Person Model
- Use Person Model Considerations

Understand the Flow of Data

Marketing Cloud, Salesforce B2C Commerce, and Service Cloud can be connected both with Connectors and other API-based integrations.
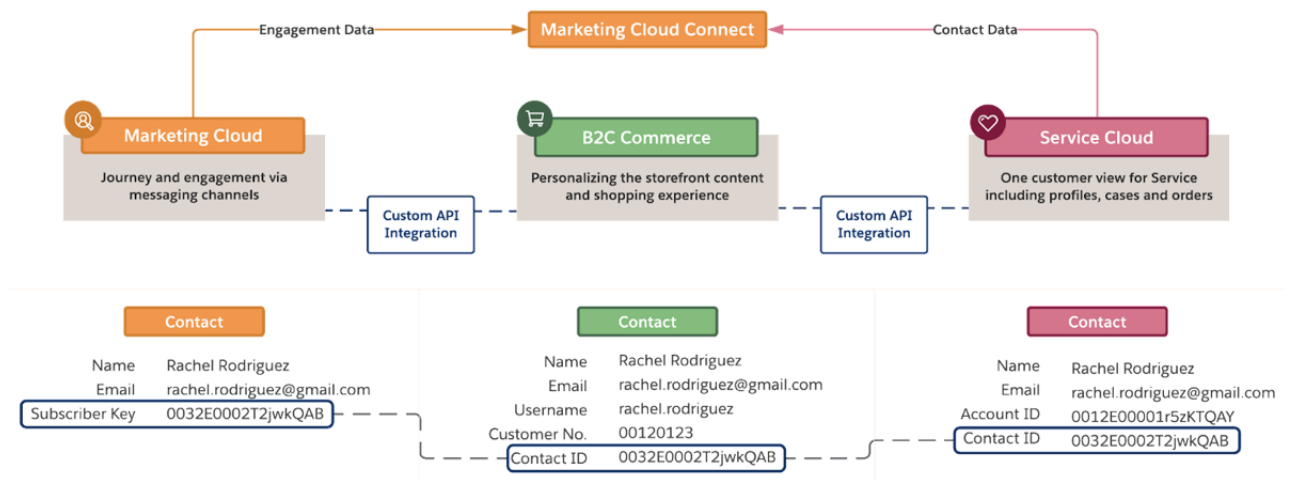
Commerce Cloud to Marketing Cloud Integration Reference Implementation

- Engages customers via transactional messaging and personalized journeys
- Manages customer subscription preferences via the storefront
- Delivers personalized product recommendations via email messaging
- Recaptures lost revenue via abandoned cart and browse

Marketing Cloud Connect (Connector Product)

- Provides configurable options for replicating Service Cloud contact, lead, and user data (including related objects) to Marketing Cloud
- Integrates Journey Builder directly with Sales Cloud and Service Cloud records. The connector triggers journeys based on record creation and updates. It provides options for updating and creating data in Salesforce from within a journey
- Exposes customer engagement data and history to Sales Cloud and Service Cloud. Users view counts of actions, such as opening emails or clicking a contact record page.

Commerce to Service Cloud Integration Reference Implementation

- Deflects high-volume and low-complexity cases with self-service
- Provides agents with updated customer profile data
- Turns service interactions into upsell opportunities by placing an order on behalf of a customer
- Drives genuine conversations with shoppers in their preferred channels

Alternative Flow of Data
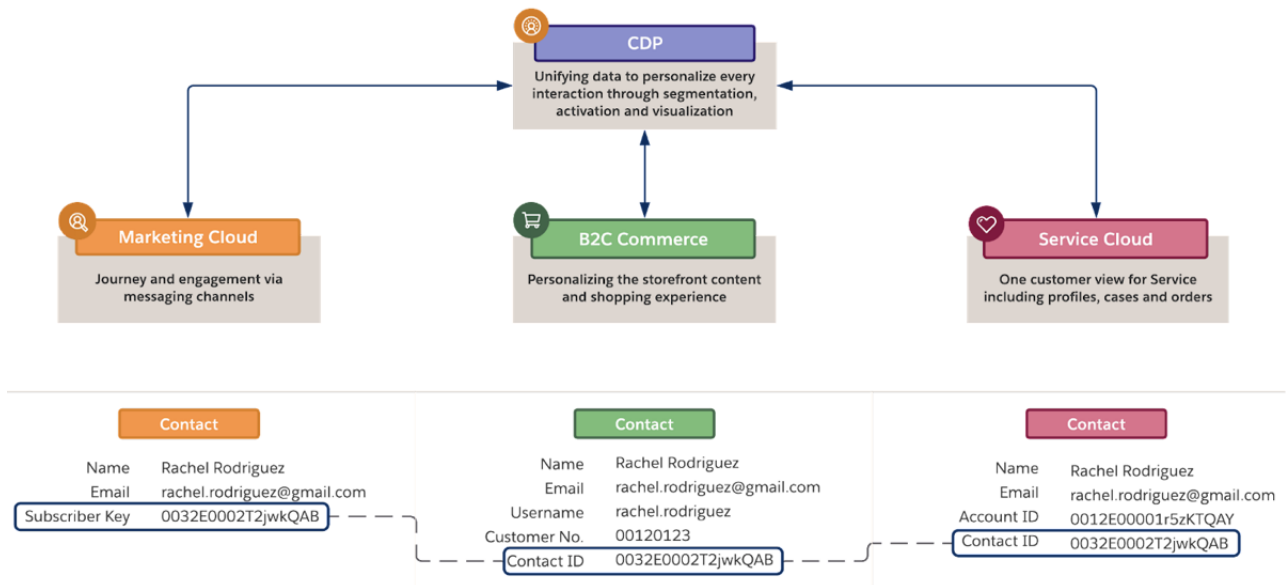
Data Cloud

- Extract using Starter Data Bundles or Data Extensions.
- The Order Bundle starter bundle creates one or more data streams to flow data from a B2C Commerce source. The data bundle automatically creates and maps data streams.
- Starter data bundles are also available for the Salesforce CRM source, including Sales Cloud, Service Cloud, and Loyalty Cloud. These bundles automatically map the data source objects to the data model objects (DMO) and establish DMO relationships that improve your segmentation results.
- Use Segmentation to break down your data into useful segments to understand, target, and analyze your customers. Create segments on any entities from your data model and then publish them on a chosen schedule or as needed.
- Activation is the process that materializes and publishes a segment to activation platforms, including Marketing Cloud, B2C Commerce, and Service Cloud.

Related Content

Review earlier steps in this solution.

- Understand Salesforce Systems of Record
- Integrate Service Cloud, Marketing Cloud, and Commerce Cloud with Integration Reference Implementations

→ Take the next steps in this implementation.
- Build a Common B2C Person Model
- Use Person Model Considerations

Build a Common B2C Person Model

Salesforce lets you build a model of a person based on person accounts, on accounts and contacts together, or on a combination of accounts, contacts, and person accounts.

Modeling B2C Customers in Salesforce Using Person Accounts

Benefits of person accounts:

- Combines account and contact object attributes to create an independent person without having to attach them directly to an existing business account.
- Works with core object functionality.
- Handles the mixing of B2B and B2C relationships.
- Connects a person account to a business contact via contact relationship.

Key considerations:

- Reverting from person accounts isn't available.
- You manage contact security at the account level.
- The record appears only in account search results.
- Merging regular contacts and person accounts isn't possible.
- Merging two site members that are person accounts isn't possible.
- Sometimes person accounts require more data storage.
- Some AppExchange offerings aren't compatible with person accounts.

Integration Considerations Around Person Accounts

While not obvious from the detail page, a person account is actually a combination of two records into one view:

- Contact Record - Account:PersonContactID

  This contact record associated with the person account contains attributes about the person. The case-insensitive, 18-digit CRM record ID for this contact record acts as the unique ID for the person across the platform behind the scenes. You connect with people, not accounts.

- Account Record - Account:ID

  This account object presents itself in Salesforce as a combination of contact and account fields. In the data model, the Account object (and the Contact object) contains a boolean flag that determines whether the record is a Person Account.

Use extra fields on the underlying contact record when it's data related to people and on the account record when it's account data. Use "No Role-Hierarchy-Based" access control.

Person Accounts and Marketing Cloud Connect

Marketing Cloud Connect has several ways to create records, including Journey Builder integrations. With both of these interfaces, Marketing Cloud Connect maps keys to contact, lead, and user records. No other objects create Marketing Cloud contacts.

Implications for person accounts:

- When you sync the contact object to Marketing Cloud, it brings both records:

  {Business Account} Contacts (isPersonAccount = "False")

  {Person Account} Contacts (isPersonAccount = "True")

- When you sync the account object to Marketing Cloud, it maps to the related contact record. Marketing Cloud Connect respects Salesforce object dependencies. It brings both records:

  {Business} Accounts (isPersonAccount = "False")

  {Person} Accounts (isPersonAccount = "True")

- Marketing Cloud Connect creates Marketing Cloud contact (subscriber) records for all Salesforce records. Avoid creating an audience in which the Marketing Cloud contact key points to a Salesforce account record ID. This duplicates and fragments Marketing Cloud contacts.

Related Content

Review earlier steps in this solution.

- Understand Salesforce Systems of Record
- Integrate Service Cloud, Marketing Cloud, and Commerce Cloud with Integration Reference Implementations
- Understand the Flow of Data

Take the next steps in this implementation.

- Use Person Model Considerations

Use Person Model Considerations

Many objects and record types in Sales Cloud and Service Cloud include data to define people. Each of these objects has a slightly different primary purpose.

Individual Object

For compliance use cases, Individual helps aggregate compliance flags for data related to people in Sales Cloud and Service Cloud.

- Use this record's boolean flags to capture master privacy-related preferences. To build out any customer consent and compliance solutions, use the preferences across the Salesforce platform.
- Design solutions to use these flags. Changing the boolean setting doesn't propagate those changes across the platform.

For use cases involving an individual record and multiple records related to people in Salesforce:

- Establishing relationships between contacts and leads on an individual record is a manual assignment effort.
- Consider associating an individual record with one contact or lead. Those records usually include channel address information, along with other personally identifiable information. Because Marketing Cloud Connect creates a unique contact for each record, using lead and contact fractures the view. It's more difficult to manage data this way.

- You can associate one lead, contact, or user with only one individual record.

When synced to the Marketing Cloud, individual records link to the Marketing Cloud Contact Model through one of the three "human" record types. Individual record IDs aren't subscriber keys.

Managing Consent and Privacy

Proper data management helps ensure that businesses comply with legal regulations and avoid penalties.

Sales Cloud and Service Cloud offer the opportunity to extend your org with Consent Management objects that track and store certain data privacy preferences.

Salesforce Privacy Center uses a managed package and Heroku to securely store your Salesforce data.

- To obfuscate customer data, Privacy Center can replace your customer's data with either random characters, known as anonymization, or mock data, known as pseudonymization.

- Privacy Center can also retain customer data by putting it into storage using Heroku Connect. While this data is retained it can't be processed or accessed by other users.

- Privacy Center can completely delete a user's record and any related information from your Salesforce org. Unlike retained data, these records are permanently deleted after the Recycle Bin clears, either through manual clearance by a user or after the 15-day expiration limit.

Leads

Lead records include details about people who are interested in your products and services. Salesforce stores lead details in lead records that sales reps can convert to contact records.

- Lead status is an engagement-level attribute. This record reflects the degree to which the person engages with your company or brand.

- Some leads never convert to contacts. Archive or clean up those unqualified leads.

- The lead conversion threshold, in which the lead becomes a contact, is arbitrary and varies by customer. Each company has different engagement methods and definitions for converting leads to contacts.

- Lead conversion requires careful planning around consent and compliance use cases. People don't know or care about how you model their data. But they expect your company to track and manage their consent for them.

Leads create a standalone Marketing Cloud Contact record.

- In Marketing Cloud, a lead is an actual contact and not a transitional record. You manage profiles, preferences, consent, and compliance for each of them, independent of any converted contact record.

- Merging and converting leads isn't available in Marketing Cloud. A lead is a legitimate contact in Marketing Cloud even after a lead conversion in Sales Cloud or Service Cloud. It's important to manage preferences and consent processes associated with the new contact in a cross-cloud sense to account for the legacy Marketing Cloud lead.

- Leads in Sales Cloud and Service Cloud help with contact record data quality, but they can damage the data quality in cross-cloud implementations.

Learn the advantages of using the Contact object instead of the lead object.

- Contacts can include multiple record types to simulate the lead conversion process, similar to opportunity stages for an opportunity record. Account for other possible lead integration points and include an archival strategy.

- A stable customer ID lets you establish one customer ID that spans all Salesforce clouds. This ID helps with any use cases that require a lifetime 360 view of the customer.

- To support each phase of the contact's journey using Lightning Experience, group and present field sets with different custom attributes based on type.

- Stable record IDs retain the contact ID when the type changes. Custom flows create records or propagation of duplicate keys across the platform, fracturing the contact view.
- You can associate contact records with multiple accounts, including person and business accounts.
- Access Control creates a combination of page layouts, sharing rules, and custom profiles to control the type and attribute visibility. For example, users who engage with only one type of contact can minimize record clutter in the platform.
- Alternatively, you can use the Lead object to bring in, deduplicate, and assign the data related to people to your model. This process converts the lead to a contact record before using cross-cloud capabilities.

Accounts and Contacts: Modeling People in Salesforce

- Contacts are typically linked to accounts, which allows you to model the structure of a household or organization. Modeling people with contacts and accounts has several benefits.
- Original structure offered by Salesforce
- Supports B2B and B2C
- Maps to standard Salesforce structure
- Simplicity of reporting and data migration
- Supports third-party integration

It's important to consider:

- Data storage implications
- Definition of household (entity)
- Integration of both objects
- Data integrity (triggers to enforce consistency between household and contact)
- Lead conversion implications

Integration Considerations Around the Contact Object

Standard Account and Contact Relationship

- The primary account relationship that a contact has informs its security model and ownership settings.
- You need sufficient information about a contact, typically B2C, to populate an account object.
- Secondary relationships can relate to multiple accounts.

Alternate Contact and Account Relationships

- Linking consumer contacts to a bucket account, such as brand, geolocation, and product line, is easier for smaller data volumes. This relationship has performance limitations, including data skew, when assigning more than 10,000 people to an account.
- Avoid using an orphan contact model unless you have no other option because it limits security, ownership, reporting, and AppExchange packages.

Consider setting up a type of contact record to mimic a lead engagement funnel.

- Using record types on the Contact object restricts views and workflows for contact records by type. You can improve this situation by using the Lead and Contact objects, but one contact record is best for cross-cloud data quality.

Avoid duplicating Sales Cloud and Service Cloud customer records before using Marketing Cloud Connect.

- Establish a day-zero practice across all systems. Avoid using duplicate records in processes such as legacy capture forms via Web Collect and Web-to-Lead.
- Avoid pick-a-winner duplication solutions in Sales Cloud and Service Cloud after integration. This solution doesn't address per-channel subscription preferences or compliance requests and fractures engagement history in cross-cloud implementations.

- If you want to manage storage and indexing issues, consider implementing an archival solution. Instead of deleting the records, move them into big objects or off the platform. This process retains the original record ID, which helps reconnect with cross-cloud data stores.

Converting leads to contacts creates duplicate keys in Marketing Cloud.

- To avoid duplicate records, avoid synchronizing or sending messages to leads via Marketing Cloud Connect.
- Using leads to capture data from external systems creates duplicate records. Check them against contacts in Sales Cloud and Service Cloud. Convert or merge them to synchronize with Marketing Cloud.

Bring only quality contacts into Marketing Cloud.

- Avoid using the contact delete framework in Marketing Cloud to delete duplicate records or remove low-quality contact records to solve billing challenges.
- Work with Salesforce Customer Support to delete these records for one-time cleanup efforts or use the contacts delete framework. Limit calls to fewer than one million records at a time.

When You Already Have Marketing Cloud and Add Service Cloud

Many of our customers have Marketing Cloud and want to add Sales Cloud or Service Cloud. So they establish a Marketing Cloud contact key that isn't a Salesforce record ID. But our guidance for cross-cloud data flow requires the use of a Salesforce record ID. In this case, these customers have two paths forward.

1. Create contact records in Marketing Cloud for each person using the Salesforce record ID.

   📝 Note: This path causes duplicate contact records. Each record has its own subscription management, consent, compliance requirements, and fragmented engagement history. This solution is acceptable only if you manage the legacy contact records through an archival process.

2. Engage Marketing Cloud Professional Services to perform a subscriber key migration. This path replaces subscriber and contact keys in Marketing Cloud with the new Salesforce contact record ID. The replacement happens in all Marketing Cloud system tables and sendable data extensions. After the migration, all Marketing Cloud contacts include Salesforce contact record ID keys. You manage subscriptions and compliance with one view of engagement history and one record.

   📝 Note: A subscriber key migration causes an email sending outage while the migration is under way. Plan accordingly with your services team. When using Marketing Cloud Connect, complete the subscriber key migration before synchronizing the contact, lead, or user records. Otherwise, your migration can fail.

Related Content

Review earlier steps in this solution.

- Understand Salesforce Systems of Record
- Integrate Service Cloud, Marketing Cloud, and Commerce Cloud with Integration Reference Implementations
- Understand the Flow of Data
- Build a Common B2C Person Model

Conversational Campaigns for WhatsApp

Link customers directly from marketing messages to a live WhatsApp chat with your agent or chatbot for any questions about the product promotion.
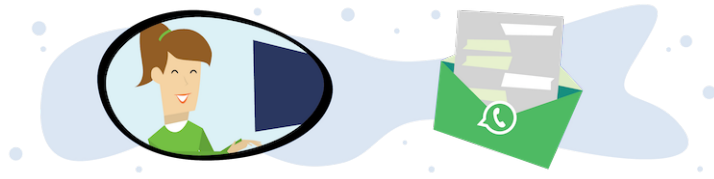
Get Started

	Explore system architecture related to this solution. • B2C Industry Blueprint • B2C Reference Architecture • B2C Solution Architectures
	Take Trailhead modules related to this solution. • Salesforce Solution Kits: Quick Look • Customer 360 Guide for Retail: Quick Look • Customer 360 Guides: Quick Look

When you link to WhatsApp messages from SMS, you provide customers with assistance that's one click away from the promotion. Your agents can secure sales from customers through personal interaction, while Service Cloud updates customer contacts for future engagement.

The Run Conversational Campaigns for WhatsApp solution kit helps you:

- Include a WhatsApp direct message link as a footer in all promotional SMS messages.
- Store messaging history in Service Cloud.
- Collect more customer data with in-channel Einstein Bots.

Required Products

- Marketing Cloud (Corporate or Enterprise Edition)
- Mobile Activation SKU
- Sales Cloud
- Service Cloud
- Digital Engagement SKU (Excluding Government Cloud)
- Omni-Channel in Lightning Experience

Implement This Solution

Workflow

Learn how data flows through the configurations to run conversational campaigns for WhatsApp.

Configure Conversational Campaigns for WhatsApp

Use these configurations to run conversational campaigns for WhatsApp.

Design Considerations

Keep these design considerations in mind when you run conversational campaigns for WhatsApp.

Customer Opt-In

Conversational campaigns for WhatsApp require different customer opt-in preferences. See opt-in settings for this solution.

Workflow

Learn how data flows through the configurations to run conversational campaigns for WhatsApp.
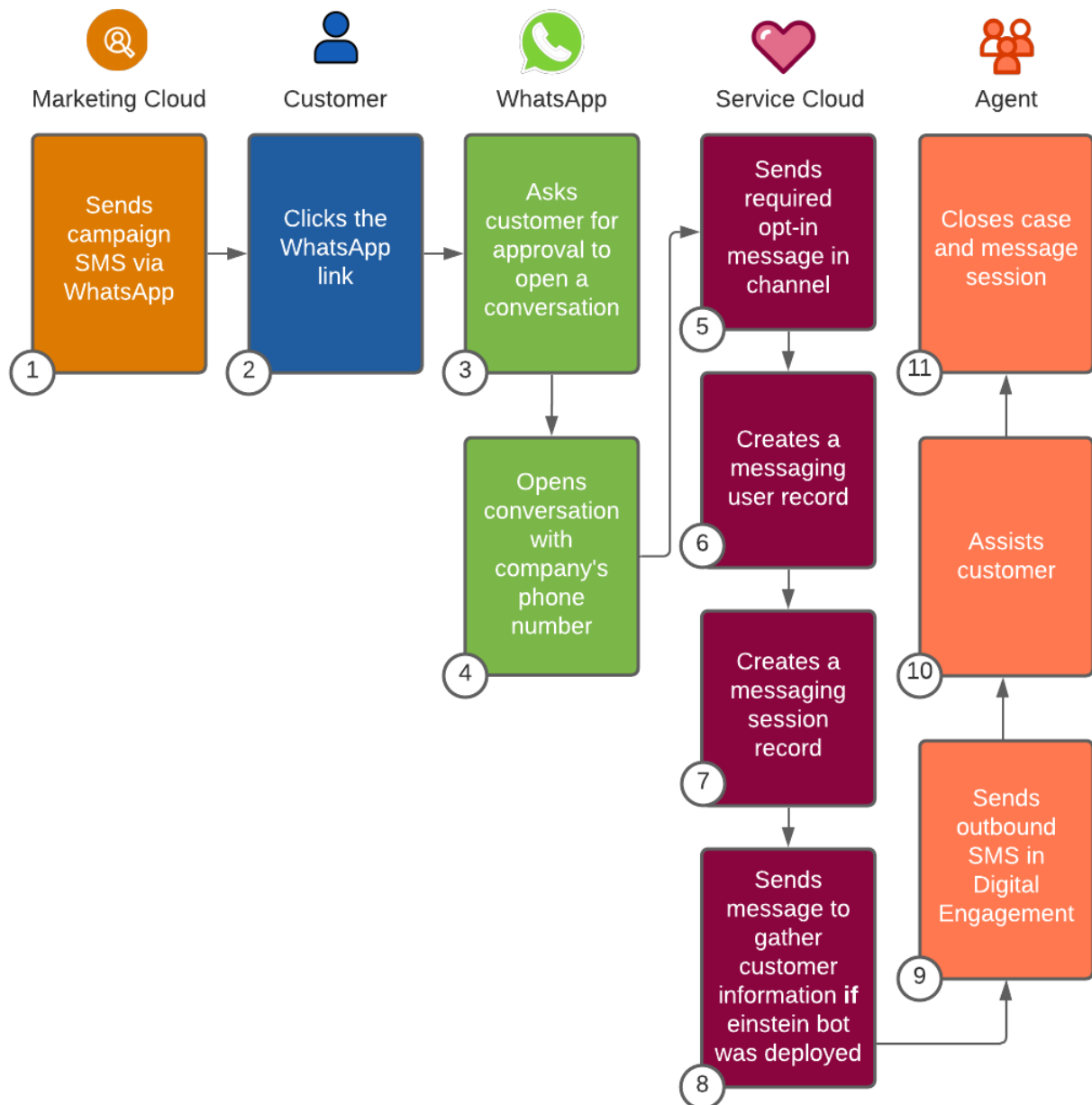
- Marketing Cloud sends a campaign SMS message with a WhatsApp link. (1)
- The customer clicks the WhatsApp link to ask a question. (2)
- WhatsApp asks for customer's approval to open a conversation in the mobile app. (3)
- The customer is brought to WhatsApp's UI and the company's phone number. (4)
- Service Cloud sends the required opt-in message in the channel. (5)
- Service Cloud creates a Messaging User record. Channel-Object Linking matches this record to any existing contact record. (6)
- Service Cloud creates the Messaging Session record. (7)
- If you deployed Einstein bots, they send messages to gather customer information. (8)
- An agent picks up the Messaging Session from the Service Console queue. (9)

- The gent assists the customer in a two-way conversation. (10)
- The agent closes the case and the Messaging Session. (11)

> 📝 **Note:** The SMS to WhatsApp solution is for service use. If a customer responds to the promotional message with a sales inquiry, have the agent create a Lead or Contact with the customer's phone number. Then use Marketing Cloud Connect to engage the customer.

Related Content

📖	Review this solution's use case and purpose. • Conversational Campaigns for WhatsApp on page 137
→	Take the next steps in this implementation. • Configure Conversational Campaigns for WhatsApp • Design Considerations • Customer Opt-In

SEE ALSO:

Lightning Service Console

Set Up Routing for Messaging Channels in Service Cloud

Messaging in Service Cloud

MobileConnect

Marketing Cloud QueueMO API

Set Up WhatsApp in Service Cloud

WhatsApp Message Template Categories in Service Cloud

Send Automated Messages in WhatsApp

Channel-Object Linking (Beta)

B2C Services Best Practices

Digital Engagement WhatsApp Business Messaging FAQs

Einstein Bots

Connect a Standard Bot to Channels

Configure Conversational Campaigns for WhatsApp

Use these configurations to run conversational campaigns for WhatsApp.

- Verify that your computer is compliant within the WhatsApp Commerce Policy.
- Provision WhatsApp manually with Facebook Business Manager.
- Set up a verified Facebook Business Manager Account.
- Contact Carriers (United States and Canada) to approve SMS campaign.
1. Set up Lightning Service Console.
2. Set up Omni-Channel Routing for Messaging.
3. Set up Salesforce Messaging.

4. Set up Marketing Cloud SMS Code in MobileConnect.

5. Set up WhatsApp in Messaging.

6. Optionally, deploy Einstein Bots to your channels.

These templates are approved for WhatsApp

- WhatsApp limits service to Transactional Messaging only and does not permit Promotional Messaging. Because of this policy, if a customer has not sent a message in the last 24 hours, your agent cannot message them directly. The expired session is visible but inaccessible in the Messaging Session UI.

- To communicate with a customer more than 24 hours after their last message, WhatsApp requires businesses to use approved Outbound Messaging Templates. This template message must be sent from Process Builder or Flow.

←	Review earlier steps in this solution. • Workflow
→	Take the next steps in this implementation. • Design Considerations • Customer Opt-In

SEE ALSO:

Lightning Service Console

Set Up Routing for Messaging Channels in Service Cloud

Messaging in Service Cloud

MobileConnect

Set Up WhatsApp in Service Cloud

WhatsApp Message Template Categories in Service Cloud

Send Automated Messages in WhatsApp

Digital Engagement WhatsApp Business Messaging FAQs

Einstein Bots

Connect a Standard Bot to Channels

Design Considerations

Keep these design considerations in mind when you run conversational campaigns for WhatsApp.

Marketing Cloud Sending Options

- Send marketing SMS messages through the Journey Builder or MobileConnect application.

    📝 **Note:** If you register for an SMS short code, expect a long waiting period. Carriers take up to 12 weeks to approve short code provisioning.

- Provide a WhatsApp link as an optional footer on all your outbound SMS messages.

- Display the link as a WhatsApp URL for transparency. WhatsApp links follow a consistent and identifiable structure: wa.me/[country code and phone number]. For example, wa.me/14150000000.

- Alternatively, generate a shortened URL with the **Shorten URL** button in MobileConnect, Content Builder, or Journey Builder when configuring the text of a new SMS message.

  > 📝 Note: Shorten links with MobileConnect, Content Builder, or Journey Builder only. If you use external methods to shorten links, Marketing Cloud cannot track statistics.

Service Cloud & Digital Engagement Considerations

- Use the Channel-Object Linking (Beta) to link the customer's WhatsApp Messaging User record to their Salesforce Contact record.
- Communicate with customers through WhatsApp in real time or in asynchronous conversations for up to 24 hours after the customer's last message.
- Store messaging history in Service Cloud to use in future engagements.

Add Customer Contact to Service Cloud

- If the customer doesn't already have a contact record, Service Cloud uses their SMS phone number to create a user in Messaging Object. Your agent must ask the customer for their first and last name and manually add it to the contact record.
- Channel-Object Linking (Beta) matches a contact record and the messaging user record by SMS phone number. If you use Marketing Cloud Connect, Channel-Object Linking records this session in the contact's history.
- If you don't use Channel-Object Linking, use APEX triggers to match the Messaging User object record to a contact record by email or phone number. If no record exists, create a contact record and relationship.

Limitations

- Typical Governor Limits within Service Cloud do not apply to this solution.
- To communicate with a customer more than 24 hours after the customer's last message, WhatsApp requires businesses to use approved Outbound Messaging Templates. This template message must be sent from Process Builder or Flow.
- To stay below data storage limits, keep contact data in Customer Relationship Management. Only bring in other data as needed.

Related Content

Review earlier steps in this solution.

- Workflow
- Configure Conversational Campaigns for WhatsApp

Take the next steps in this implementation.

- Customer Opt-In

SEE ALSO:

Set Up Routing for Messaging Channels in Service Cloud

MobileConnect

Send Automated Messages in WhatsApp

Channel-Object Linking (Beta)

B2C Services Best Practices

Customer Opt-In

Conversational campaigns for WhatsApp require different customer opt-in preferences. See opt-in settings for this solution.

Marketing Cloud Opt-In Considerations

Outbound SMS messages can only be sent to Subscribers who opted in to receive them.

- The initial Outbound SMS message sent through MobileConnect uses the customer's existing Marketing Cloud SMS Opt-In Status.
- If you created a MobileConnect subscriber from SMS-Opt-In, they are managed as a separate Marketing Cloud contact from the Service Cloud contact.
- If you created a MobileConnect subscriber from API using the Service Cloud Contact ID as the subscriber key, one contact can use the same consent flags.

WhatsApp Opt-In Considerations

- The customer's opt-in is session-specific. The session lasts up to 24 hours from the customer's last message.
- The opt-in flag is stored in Service Cloud on the Messaging Session Object.
- The Messaging Session Object opt-in flag is not a mobile opt-in for general SMS or other Messaging activities.
- When a customer clicks into WhatsApp, they implicitly opt in through the interstitial page. This grants WhatsApp and Service Cloud Messaging permission for a specific template. To broaden the permission for all templates and use the same flag in Service Cloud, create a custom field on the Messaging User Record with APEX.

Related Content

> ← Review earlier steps in this solution.
> - [Workflow](#)
> - [Configure Conversational Campaigns for WhatsApp](#)
> - [Design Considerations](#)

SEE ALSO:

[MobileConnect](#)

[Marketing Cloud QueueMO API](#)

[Channel-Object Linking (Beta)](#)

[B2C Services Best Practices](#)

Conversational Campaigns for SMS

Link customers directly from marketing messages to a live SMS chat with your agent or chatbot for any questions about the product promotion.
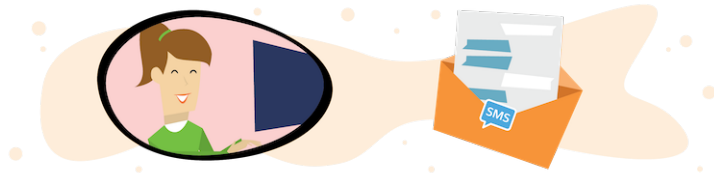
Get Started

	Explore system architecture related to this solution. • B2C Industry Blueprint • B2C Reference Architecture • B2C Solution Architectures
	Take Trailhead modules related to this solution. • Salesforce Solution Kits: Quick Look • Customer 360 Guide for Retail: Quick Look • Customer 360 Guides: Quick Look

When you include a HELP keyword prompt with SMS, you provide customers with assistance that's one message away from the promotion. Your agents can secure sales from customers through personal interaction, while Service Cloud updates customer contacts for future engagement.

The Run Conversational Campaigns for SMS solution kit helps you:

- Include a keyword prompt as a footer in all promotional SMS messages.

- Store messaging history in Service Cloud.

Required Products

- Marketing Cloud (Corporate or Enterprise Edition)
- Mobile Activation SKU
- Sales Cloud (Enterprise or Unlimited Edition)
- Service Cloud (Enterprise or Unlimited Edition)
- Digital Engagement SKU (Excluding Government Cloud)
- Omni-Channel in Lightning Experience

Workflow

Learn how data flows through the configurations to run conversational campaigns for SMS.

Configure Conversational Campaigns for SMS

Use these configurations to run conversational campaigns for SMS.

Design Considerations

Keep these design considerations in mind when you run conversational campaigns for SMS.

Customer Opt-In

Conversational campaigns for SMS require different customer opt-in preferences. See opt-in settings for this solution.

Workflow

Learn how data flows through the configurations to run conversational campaigns for SMS.
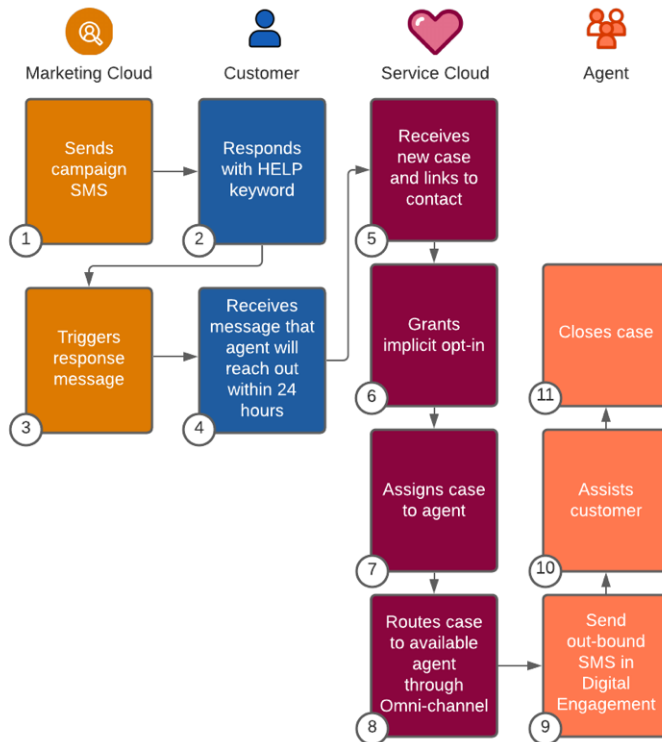
- Marketing Cloud sends a campaign SMS message. (1)
- The customer responds with the keyword $HELP$. (2)
- Marketing Cloud triggers a response message. (3)
- The customer receives a message notifying them that within 24 hours an agent is going to text them from another number. (4)
- Service Cloud receives the new case AMPscript created and links it to the existing contact or creates a one. (5)
- Service Cloud grants implicit opt-in. (6)
- Service Cloud assigns the case to the agent queue. (7)
- Service Cloud routes the case through Omni-Channel to available agents. (8)
- The agent sends an outbound SMS from a long or short code configured in Digital Engagement. (9)
- The agent assists the customer via a two-way conversation. (10)
- The agent closes the case after they have finished assisting the customer. (11)

Related Content

Review this solution's use case and purpose.

- Conversational Campaigns for SMS on page 144

→ Take the next steps in this implementation.

- Configure Conversational Campaigns for SMS
- Design Considerations
- Customer Opt-In

SEE ALSO:

Connect Customers to Support from an Outbound Text Campaign

Lightning Service Console

Set Up Routing for Messaging Channels in Service Cloud

Messaging in Service Cloud

OAuth Authorization Flows

REST API Case Object Resources

MobileConnect

Marketing Cloud QueueMO API

Channel-Object Linking (Beta)

B2C Services Best Practices

Configure Conversational Campaigns for SMS

Use these configurations to run conversational campaigns for SMS.

1. Set up Lightning Service Console.

2. Set up Omni-Channel Routing for Messaging.

3. Set up Salesforce Messaging.

4. Set up Marketing Cloud SMS code in MobileConnect.

5. Create a data extension to manage tokens for the Connected App.

6. Activate and enable SMS code for Digital Engagement.

7. Set up Customer Support from an Outbound Text Campaigns.

← Review earlier steps in this solution.

- Workflow

→ Take the next steps in this implementation.

- Design Considerations

- Customer Opt-In

Design Considerations

Keep these design considerations in mind when you run conversational campaigns for SMS.

Marketing Cloud Sending Options

- To record messaging history, send marketing SMS messages through the Journey Builder or MobileConnect application.
- Set the trigger that creates a support case. Use the standard *HELP* keyword, or set a unique keyword. You can also set the sales case to only open for non-keyword responses that otherwise trigger error messages.

Add Customer Contact to Service Cloud

- If the customer doesn't have a contact record, Service Cloud uses their SMS phone number to create a user record in the Messaging object. Your agent must ask the customer for their first and last name and manually add it to the contact record.
- Channel-Object Linking (Beta) matches a contact record and the messaging user record by SMS phone number. If you use Marketing Cloud Connect, Channel-Object Linking records this session in the contact's history.
- If you don't use Channel-Object Linking, use APEX triggers to match the Messaging User object record to a contact record by email or phone number. If no record exists, create a contact record and relationship.

Related Content

Review earlier steps in this solution.

- Workflow
-

Take the next steps in this implementation.

- Customer Opt-In

Connect Customers to Support from an Outbound Text Campaign

MobileConnect

Channel-Object Linking (Beta)

B2C Services Best Practices

Customer Opt-In

Conversational campaigns for SMS require different customer opt-in preferences. See opt-in settings for this solution.

Marketing Cloud Opt-In Considerations

Outbound SMS messages can only be sent to subscribers who opted in to receive them.

- The initial outbound SMS message sent through MobileConnect uses the customer's existing Marketing Cloud SMS opt-in status.
- If you created a MobileConnect subscriber from SMS-Opt-In, they are managed as a separate Marketing Cloud contact from the Service Cloud contact.
- If you created a MobileConnect subscriber from API using the Service Cloud Contact ID as the subscriber key, one contact can use the same consent flags.

SMS Session Opt-In

- The Messaging Session Object opt-in flag is not a mobile opt-in for general SMS or other Messaging activities.
- The customer implicitly opts in to the Service Messaging Session by texting *HELP*.
- The customer's opt-in is session-specific. A standard session lasts up to 24 hours from the customer's last message.
- The opt-in flag is stored in Service Cloud on the Messaging Session Object.

Related Content

Review earlier steps in this solution.

- **Workflow**
- Configure Conversational Campaigns for SMS on page 147
- Design Considerations

MobileConnect

Marketing Cloud QueueMO API

Channel-Object Linking (Beta)

B2C Services Best Practices

Communicate Store Changes

Build trust with your customers by keeping them updated on your store policies, hours, and any changes to locations.

Get Started

	Explore system architecture related to this solution.
	• B2C Industry Blueprint
	• B2C Reference Architecture
	• B2C Solution Architectures
	Take Trailhead modules related to this solution.
	• Salesforce Solution Kits: Quick Look
	• Customer 360 Guide for Retail: Quick Look
	• Customer 360 Guides: Quick Look

Engage with customers when you update store information to encourage safe shopping and avoid negative sentiment. Use B2C Commerce data and Marketing Cloud tools to offer shoppers information about frequently changing store hours and the safest way to shop.

This solution kit helps you:

- Post an ad on social media with relevant store information.
- Advertise hours and options for shopping.
- Update open hours, safety protocols, and other store messages.
- Post to an ad network.

Required Products

- Marketing Cloud Professional/Corporate/Enterprise Edition
- Advertising Studio (with Audiences and Campaigns)

Optional Products

- Journey Builder
- B2C Commerce
- Interaction Studio

Implement This Solution

Communicate Store Changes Workflow

Learn how data flows through the configurations to communicate store changes.

Design Considerations

Keep these design considerations in mind when you communicate store changes.

Configurations

Use these Advertising Studio and Journey Builder configurations to communicate store changes.

Communicate Store Changes Workflow

Learn how data flows through the configurations to communicate store changes.

Workflow
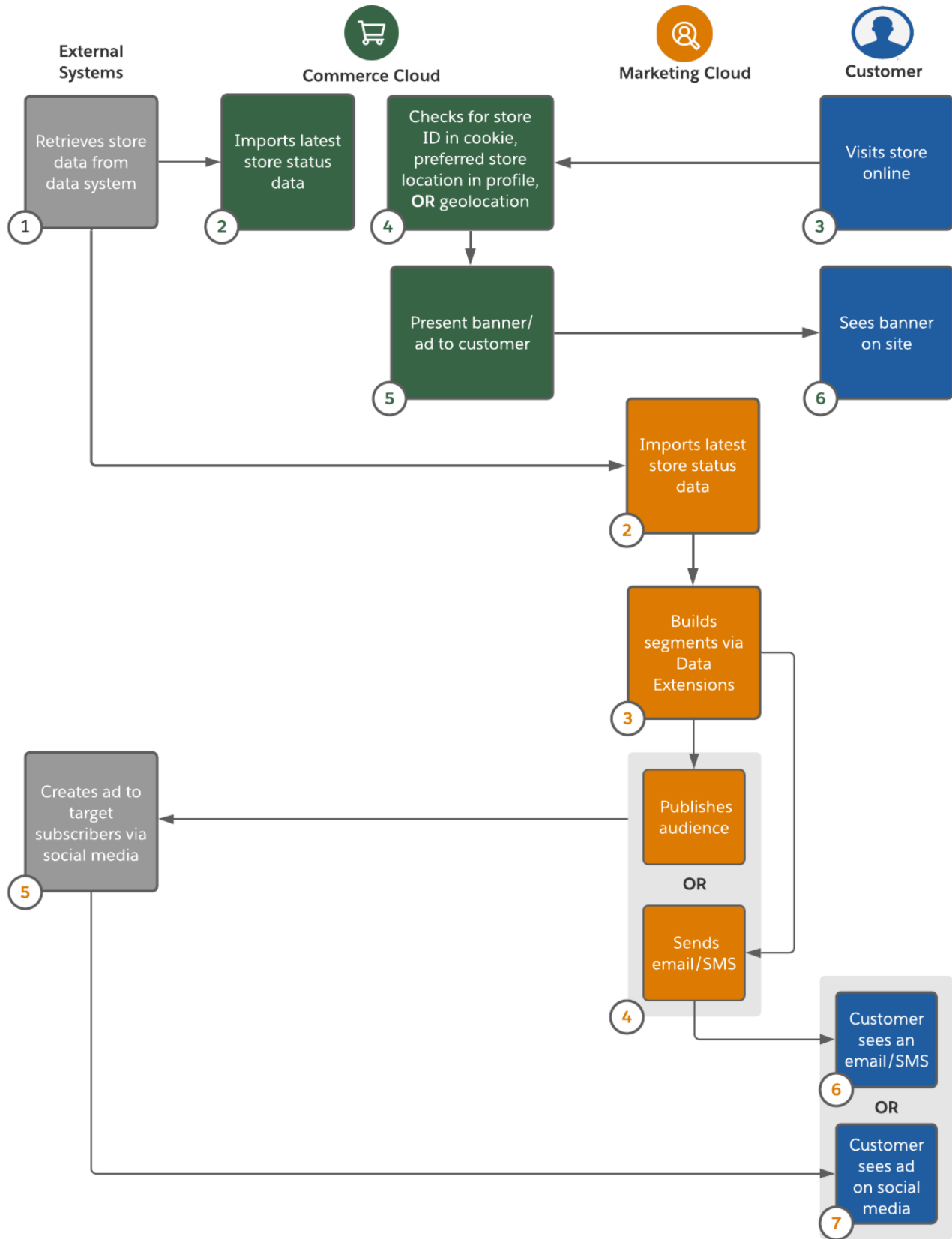
B2C Commerce Path

1. An external system retrieves the store's data from a data system.

2. The latest store status data from the external system is imported into B2C Commerce.

3. The customer visits the store's website.

4. B2C Commerce checks if the customer has a store ID in their cookies, a preferred store location in their profile, or geolocation enabled.

5. A banner or ad is presented to the customer when the correct store has been identified.

6. The customer sees the banner or ad on the store's website.

Marketing Cloud Path

1. An external system retrieves the store's data from a data system.

2. The latest store status data from the external system is imported into Marketing Cloud.

3. Marketing Cloud builds segments using Data Extensions.

4. Marketing Cloud publishes audiences or sends an email, push, or SMS message.

5. If Marketing Cloud publishes audiences, then the external system creates an ad to target subscribers via social media.

6. If Marketing Cloud sends an email, push, or SMS message, the customer sees the content in the email, push, or SMS.

7. After the ad has been created, the customer sees the content on social media.

Alternative Solutions

Marketing Cloud Personalization (formerly Interaction Studio)

Learn how data flows through Marketing Cloud Personalization to communicate store changes.
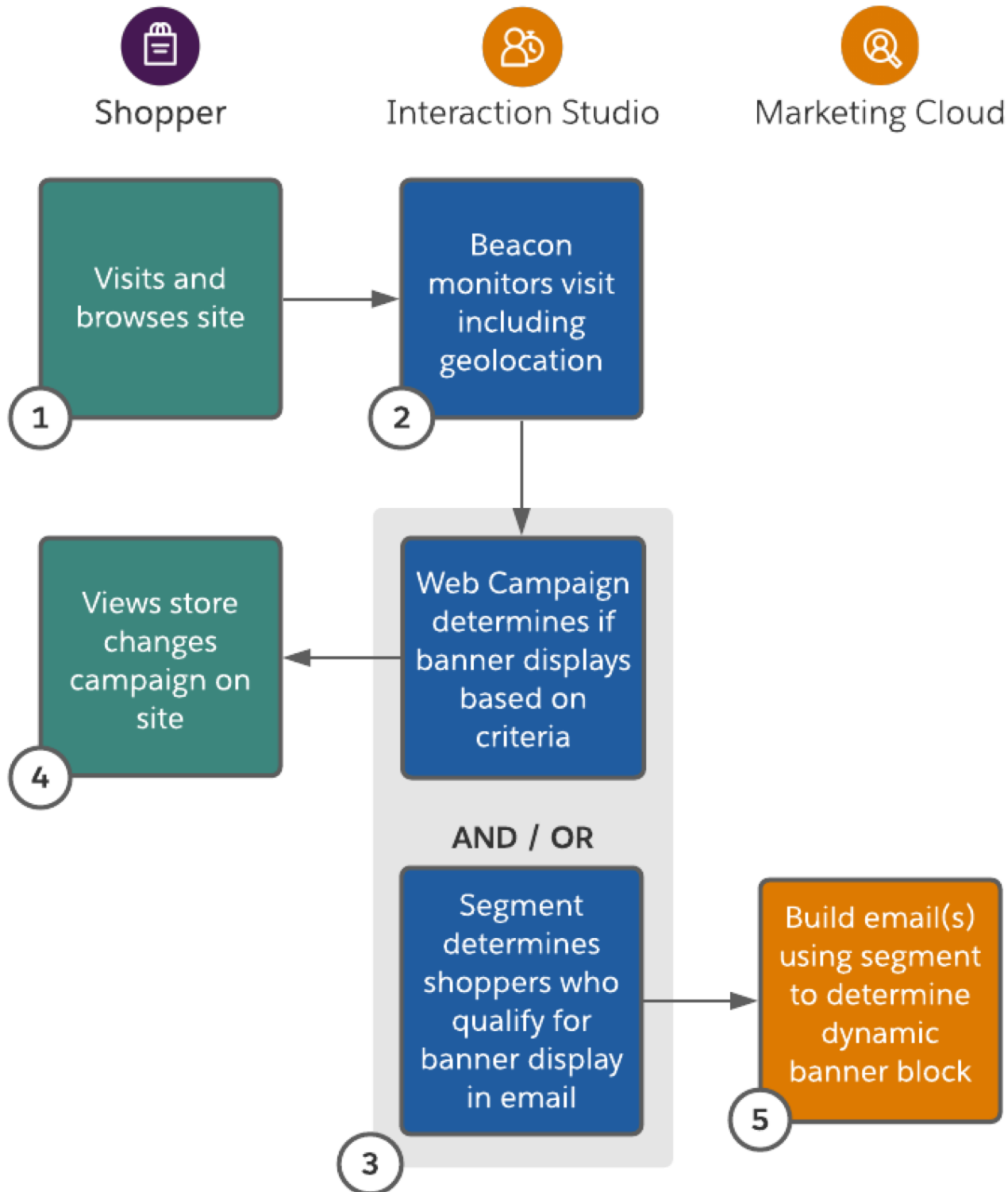
1. The shopper visits the website.

2. Marketing Cloud Personalization gathers information about the shopper's geolocation upon page load.

3. A Marketing Cloud Personalization web or segment or both determines that the shopper is in an area that has local store changes.

4. A Marketing Cloud Personalization web campaign displays content such as a banner regarding store changes on the website.

5. Marketing Studio uses a Marketing Cloud Personalization segment to display dynamic content in an email.

Functionality Considerations

- License Marketing Cloud Personalization to use the JavaScript beacon and site map.
- Use Marketing Cloud Personalization Web Campaign Targeting and Experience Rules to shape content, including targeted web campaigns.
- Use Marketing Cloud Personalization Open-Time Email Campaigns to shape email content.

Related Content

Review this solution's use case and purpose.

- Communicate Store Changes on page 150

Take the next steps in this implementation.

- Design Considerations on page 156
- Configurations on page 158

Design Considerations

Keep these design considerations in mind when you communicate store changes.

Best Practices

Display consistent local store policies and pickup locations (street, mall, and so on) across all communications sites, bots, and emails.

To set up scheduling for appointment shopping, refer to the Scheduling Appointments Solution Kit.

Key Considerations for Marketing Cloud

Use Advertising Studio to create your audience or Journey Builder to create both the audience and the advertising campaign.

Journey Builder

- Supports creation of ad audiences for Facebook, Google Ads, LinkedIn, Twitter, and Pinterest.
- Supports creation of ad campaigns for only Facebook.
- Allows you to target subscribers on a repeated schedule.

Use a query activity in Automation Studio to automate the flow of data into the audience or Journey Builder.

Set up refresh schedules for the audience so that the same audience doesn't receive the same ad for an extended period.

Customers that exit journeys remain in the associated Advertising Audience. The contacts matched in this audience see advertisements until the campaign ends or its retention period expires. Manage the length of a contact's advertising exposure in the Journey Builder configuration view. In the campaign activity, set the **Retention Period** to **Days contacts will be retained**. Enter 1 day or more.

You can also use Advertising Studio to display relevant messaging in the following cases:

- An existing customer searches for a brand keyword on Google. You can show them a relevant ad in the search results with a tailored message.
- An existing customer searches for whitespace keywords on Google. You can show them a relevant ad in the search results with a tailored message.

For more information, see best practices when using customer information for a custom audience.

Whenever possible, use a unique identifier and soft identifiers. Soft identifiers increase audience match rates.

Email, Mobile Push, or SMS

An alternative to Advertising Studio is using Email, Mobile Push, or SMS to directly communicate store messaging with your subscribers.

- Determine the targeting criteria. For example:
    - Subscriber ZIP code
    - Subscriber's favorite store
    - Last store purchased in

- To store the data you decided on in the previous step, create a sendable data extension. Include the relevant key to the channel you plan to use. For example, use SubscriberKey for the email channel.

- Send an email, mobile push message, or SMS using the data extension created in the previous step. If using email as the channel, ensure that the email classification is Marketing or Commercial or both.

Performance and Scalability Considerations

Refer to Journey Builder Best Practices for Journey design and implementation.

Limitations and Guardrails

The network receives the audience from Marketing Cloud and makes it available in their UI in the following periods. Each network has its own audience processing time:

- Facebook: 1–2 hours
- Google: 7 hours
- Twitter: 24 hours

Journey Builder injects subscribers into the campaign on an hourly schedule.

B2C Commerce Considerations

You can alert shoppers to store reopenings with a banner on your site.

To implement this solution:

1. When a customer places an order, capture the store's ID in a cookie. Include a custom attribute of the customer's profile if they're logged in. Storing the ID in a cookie lets you tell the customer that the store is reopening without logging in. Storing the customer profile provides the same information when the customer visits the site on another device that doesn't contain the cookie.

2. Implement logic to check for the ID. Any visitor who returns to the online storefront sees a banner showing them that their store is reopening. If the logic doesn't find the ID, you can use geolocation. Save each store's open status in a custom attribute of the Store object.

3. In the banner, link to the store details page for that store so the customer can review store hours and any other store details.
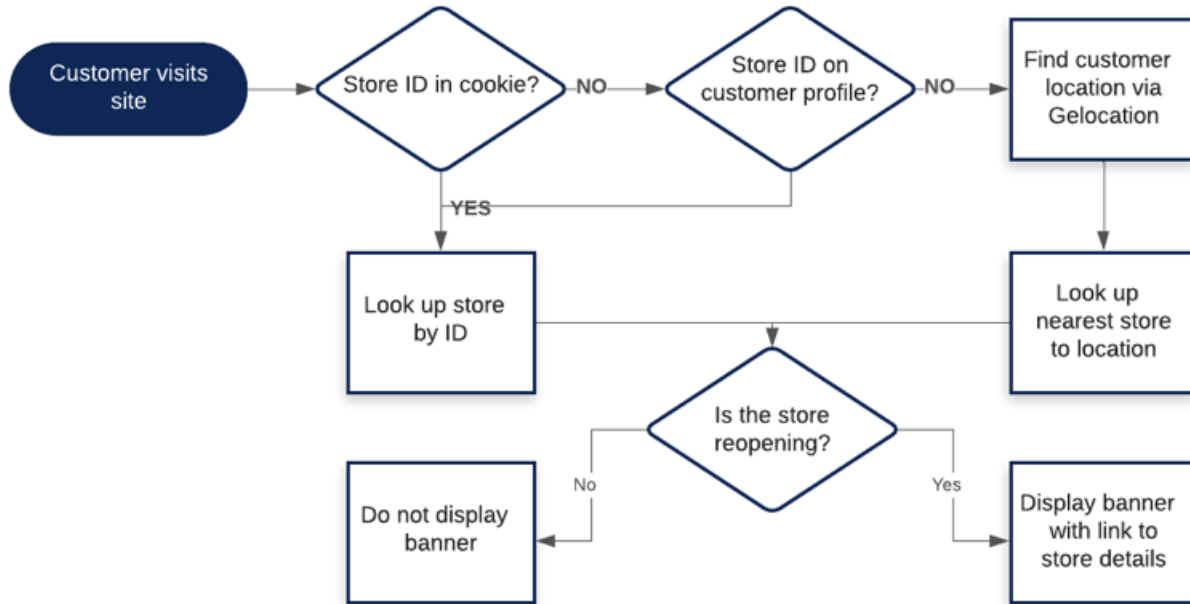
Related Content

	Review earlier steps in this solution.
←	• Communicate Store Changes Workflow on page 151

	Take the next steps in this implementation.
→	• Configurations on page 158

See Also

- Automation Studio
- Automation Studio Activities
- Buy Online, Pick Up in Store (BOPIS) Solution Kit
- Create a Data Extension
- Journey Builder
- Journey Builder Advertising Campaign

Configurations

Use these Advertising Studio and Journey Builder configurations to communicate store changes.

Advertising Studio Configuration

Advertising Studio Audiences lets you use CRM/first-party data from Marketing Cloud to target digital advertising campaigns. You can target campaigns across Facebook, Google, Twitter, YouTube, Google Ads, Pinterest, LinkedIn, or Instagram.

To target campaigns, you can use partner networks such as Salesforce DMP, LiveRamp, LiveIntent, Viant, and Neustar.

This configuration is easier than the Journey Builder configuration and involves Advertising Studio, Marketing Cloud, and your social media platform.

Initial Setup

Authorize the customer's advertising accounts in Marketing Cloud to send audiences to their desired network.

Set Up the Data Extension in Marketing Cloud

Determine how to target subscribers.

Consider using one of the following criteria:

- Subscriber ZIP code
- Subscriber's favorite store
- Last store purchased in

To store the data that you decided on in the previous step, create a data extension. Include the email address column with the email data type, even if it's blank. Other data considerations:

- To avoid long processing times, limit the number of columns in tables, and remove any unnecessary data. Include only the columns you are matching.
- Use the appropriate data type and field length. Avoid field lengths of more than 100 characters.
- When including a phone number, include the country code. For example, +1 for the US.

  Note: You can provide the data to determine the criteria. Use a custom file drop, an automation studio query activity that reads the data and filters the list of subscribers, or a manual filtered data extension.

Create an Advertising Audience in Advertising Studio

- Create an advertising audience. Provide a name and the social media platform you want to target. Select the onboarding partner (if applicable), destination, and ad account.
- Select the data extension that stores the data that you decided on in the previous step. Map the audience identifiers. Select the data origin: user-provided only, partner-provided only, or both.

  Note: Map at least one identifier for the audience to match.

- Select whether to manually refresh the data or if you want to schedule the refresh.

  Note: If reusing the audience, set it to refresh on a schedule.

- Activate the audience.

  Note: Allow 1–2 hours for the audience to process with Facebook. For Twitter, allow 24 hours. After this period, you can use the audience in your social media platform with targeted advertising. To refresh the audience, schedule the automation to refresh immediately after the underlying data.

Link the Audience to the Advertisement in the Social Media Platform

The audience populates in the destination network. The customer or agency is free to use it within their media campaigns for targeting.

  Note: The network receives the audience from Marketing Cloud and makes it available in their UI. Each network has its own audience processing time:

- Facebook: 1–2 hours
- Google: 7 hours
- Twitter: 24 hours

Journey Builder Configuration

This configuration involves Advertising Studio, Journey Builder, and Facebook. Set up the audience, advertisement, and the campaign in Journey Builder.

📝 **Note:** This advertising campaign configuration supports only Facebook.

Initial Setup

Set Up Advertising Authorization in Marketing Cloud

To send audiences to the desired network, authorize the customer's advertising accounts in Marketing Cloud.

Set Up the Data Extension in Marketing Cloud

Determine the targeting criteria.

For example:

- Subscriber ZIP code
- Favorite store
- Last store purchased in

Create a sendable data extension to store the data from the previous step. Include the email address column with the email data type, even if blank. Other data considerations:

- To avoid long processing times, limit the number of columns in tables, and remove any unnecessary data.
- Use the appropriate data type and field length. Avoid field lengths of more than 100 characters.
- All data extensions used for audiences require an email and email data field type, even if left blank.
- If including a phone number, include the country code. For example, +1 for the US.

Choose a way to provide the data to determine the criteria:

- Custom file drop
- An automation that reads the data and filters the list of subscribers in a query activity
- Manual filtered data extension

Create a Journey in Journey Builder

Create a journey with the data extension containing the store-specific subscriber data as the entry source.

Add an Advertising Campaign Activity in Journey Builder

- Add an Ad Campaign activity to the journey and configure it. Provide the name, social media connection, origin of data, and the retention (refresh) period for the audience.
- Set up the creative for the advertising campaign.
- Set up the campaign information.

Activate the Journey

Set up the schedule for the journey, and activate it.

📝 **Note:** If the journey populates regularly, create an automation that refreshes the data based on revised criteria.

Related Content

⬅ Review earlier steps in this solution.

- Communicate Store Changes Workflow on page 151

- Design Considerations on page 156

See Also

- Advertising Studio
- Advertising Studio FAQ
- Advertising Studio Implementation Trailhead Module
- Create a Data Extension
- Journey Builder
- Journey Builder Advertising Campaign

Schedule an Appointment

Implement scalable processes to let shoppers schedule appointments.

Get Started

Explore system architecture related to this solution.

- B2C Industry Blueprint
- B2C Reference Architecture
- B2C Solution Architectures
- Salesforce Scheduler Data Model Overview

Take Trailhead modules related to this solution.

- Salesforce Solution Kits: Quick Look
- Customer 360 Guide for Retail: Quick Look
- Customer 360 Guides: Quick Look
- Appointment Booking with Salesforce Scheduler Trail

Providing safe shopping experiences to shoppers increases the opportunity to cultivate relationships and deliver products in a changing world. Enabling scheduling helps retailers assign resources more efficiently and better address customers' shifting needs.

This solution kit helps you:

- Enable customers to self-schedule appointments from your commerce or external site.
- Allow appointments based on capacity of store, resources, or assets managed by location.
- Solve for logistics and personalization to deliver efficient, personalized appointments by leveraging Salesforce data.

Required Products

- One of more of these clouds:
  - Sales Cloud
  - Service Cloud
  - Industries, for example Health, Manufacturing, Consumer Goods, or Financial Services

- Salesforce Scheduler Permission Set License
  - One license per schedulable asset or resource being scheduled

Implement This Solution

Understand the Schedule an Appointment Solution Workflow

Learn how data flows through the configurations to schedule an appointment.

Recommended Technology

Use Salesforce Scheduler as the basis of your appointment booking system.

Configurations

Use these configuration steps to schedule an appointment.

Design Considerations

Keep these design considerations in mind when you implement your appointment booking system.

SEE ALSO:

Solution Kits for Retail and B2C

Understand the Schedule an Appointment Solution Workflow

Learn how data flows through the configurations to schedule an appointment.

Workflow
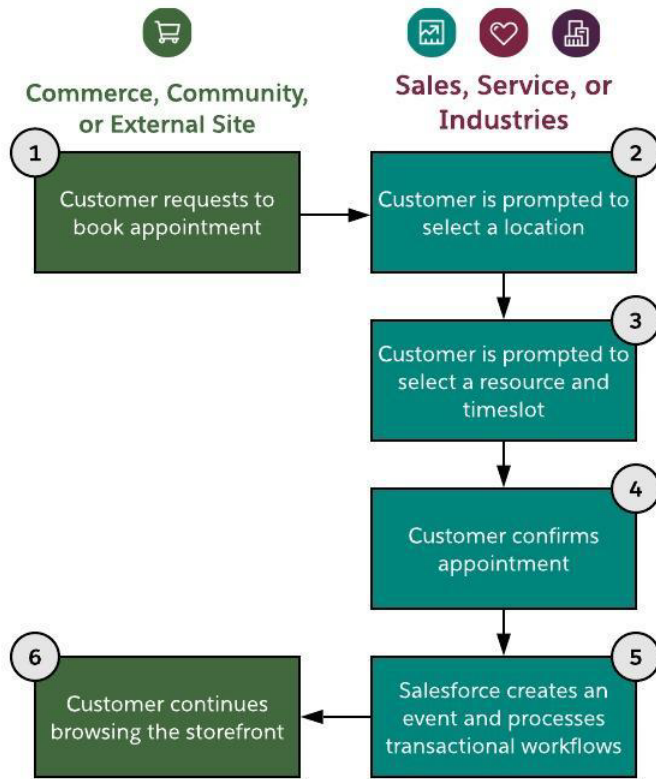
1. The customer requests to book an appointment.

2. The customer is prompted to select a location.

3. The customer is prompted to select a resource and a time slot.

4. The customer confirms their selections.

5. Salesforce creates an event and processes transactional workflows.

6. The customer continues browsing the storefront.

Related Content

Review this solution's use case and purpose.

- Schedule an Appointment on page 161

Take the next steps in this implementation.

- Recommended Technology
- Configurations

> • Design Considerations

Recommended Technology

Use Salesforce Scheduler as the basis of your appointment booking system.

Salesforce Scheduler supports location- and capacity-controlled booking use cases.

Use Salesforce Scheduler to let customers set appointments with specialized resources, such as a particular retail associate or based on skills needed.

Asset scheduling moves beyond solely resource-booked appointments to provide scheduling based on more complex needs. Allow customers to book based on factors such as retail capacity or private room availability for in-store browsing. Schedule unlimited assets in the same functionality provided for resource-based booking.

General Information

- Salesforce Scheduler is available for Platform User license. Review the Schedule Resource details when planning licenses.
- There are limitations to having both Field Service and Scheduler in the same org. Talk with your Success Manager before pursuing Salesforce Scheduler if you already have Field Service installed.
- Lightning Experience must be turned on for the org before Salesforce Scheduler can be enabled.

Functionality Considerations

- Guest Site User Inbound Scheduling allows an unauthenticated user to schedule an appointment.
  - Enable a Salesforce Experience Cloud Community or a Salesforce Site.
  - If your scheduling process allows for unauthenticated scheduling, configure the Portal and Organizational Sharing for guest user access.
- External Sites using Embedded Services are able to expose the inbound scheduling without authentication of the customer via Lightning Out Apps.
- To access Salesforce Scheduler, customers must be using a supported web browser.

Flow Builder Considerations

- Start from Salesforce Scheduler Standard Flow Template. Configure a personalized experience by enhancing flow templates with Flow Lightning Components or Apex Actions.

  Use API or customer components to support use cases where mobile responsiveness and multiple timezone booking requirements are critical. When designing custom API solutions, review out-of-the-box templates for workflow considerations.

- Scheduler flows can be used out-of-the-box in Communities and Embedded Services, or extended through custom Lightning Components and APIs.

💡 **Tip:** To customize standard flow templates, first clone the template from the flow designer.

Outbound Scheduling:

- Invoke the out-of-the-box outbound (employee-driven) scheduling flow from account, opportunity, and lead record pages in Salesforce using the Schedule Appointment Lightning Action.

Inbound Scheduling:

- Invoke the out-of-the-box inbound (customer-driven self-service) scheduling flow.

- Authenticated customers can schedule and modify appointments in an Experience Cloud site, or externally from a storefront or company website. Enable Salesforce Identity to let end-customers authenticate with Salesforce to book and schedule appointments.

General Limits

- Salesforce Scheduler limits and limitations apply.

- For guest users, times display using the site's default time zone, not the customer's current time zone.

Optional Technology

- Use Marketing Cloud Personalization Web Campaigns to present the scheduler to shoppers who meet defined criteria or show exit intent from your site.

Related Content

←	Review earlier steps in this solution. • Understand the Schedule an Appointment Solution Workflow on page 162
→	Take the next steps in this implementation. • Configurations • Design Considerations

SEE ALSO:

Salesforce Scheduler Implementation Guidelines

Configurations

Use these configuration steps to schedule an appointment.

Prerequisites

Appointment time slots are determined based on your Salesforce Scheduler data model configurations. Before exposing Salesforce Scheduler Inbound or Outbound actions to your users, set up records for the following objects.

- Service Resources
- Assets
- Service Territory Members
- Work Type Groups
- Work Types
- Work Type Group Members

- Service Territory Work Types

If your use case requires Guest Site User Scheduling, configure Guest Profile Access. Set the default timezone for the guest user profile for the Scheduler. Additional customization is required to support the timezone mapping for guest appointments that can be passed via APIs if out-of-the-box flow templates don't support use cases.

Set Organization Wide Sharing for external access to default to Public Read Only on the following objects.

- Work Type
- Work Type Group
- Service Resource
- Service Territory
- User

To allow a guest to schedule appointments, update the Guest User Profile to allow guests users to

- Run flows.

  - Open guest user access for your custom guest appointment flow.

    1. To create a custom flow, open your custom Inbound New Guest Appointment flow template and save it.

    2. To surface your flow for public consumption, follow these instructions to select **Override default behavior and restrict access to enabled profiles or permission sets**. Don't add anything to enabled profiles.

    3. Navigate to your guest user profile, then click **Flow Access**.

    4. Click **Edit** and add your Inbound New Guest User customer flow to the list of enabled flows.

  - If your org has Run Flows permission, you can leverage that permission. However, the Run Flows permission will sunset Summer '22.

- Edit events within Salesforce. Guest users are allowed to create objects such as booking but not edit objects such as service appointments.

Create sharing rules for guest users.

- Determine which records to expose to your Experience Cloud Community's guests.
- Set create criteria-based record-sharing rules to match your business process for the following objects.

  - Service Resource
  - Service Territory
  - Work Type
  - Work Type Group

- Optionally, configure field level security for the Asset field on the Service Resource object.

  - The Asset field becomes available only when your org has an Asset Scheduling license enabled and provisioned in the instance.
  - Grant Edit permission to profiles that book appointments for Assets, including guest profiles.

- Add the Asset field to the page layout for the Service Resource object.

  Note: Without defining sharing rules for guests, unauthenticated users can't access the records required for the Inbound New Guest Appointment flow. This requirement applies to Embedded Services hosted in an Experience Cloud community or external site.

Technical Architecture

Choose how you wish to customize, extend, or enhance Salesforce Scheduler from available implementation approaches. Review all available documentation to understand the product, such as Salesforce Scheduler, Salesforce Scheduler Implementation Guide, and the Salesforce Scheduler Developer Guide. Study the data model. The Salesforce Scheduler product is a unique data-driven engine in which the ERD and object model works along with the actual data input in records within the object to function.

Appointment scheduling can be enabled using low-code or high-code methods and each option offers trade-offs and advantages. Review capabilities and limitations of tools available on the Salesforce platform to help define the best approach to support your business process. Consider the available skill sets of your team as you make your choices.

Keep in mind other ways to extend the Salesforce Scheduler.

- Chatbots
- Email and SMS
- Event Management and Sync

Declarative Low Development Appointment Setup

- This option requires minimal development, but styling options are limited and testing is completed manually. This option is generally a great starting point to any implementation.
- This method offers the quickest time to a live solution. This method is also a great low-effort proof-of-concept to show stakeholders what Salesforce Scheduler has to offer.
- Use the Standard Flow Template configuration with configurable customizations from Flow Builders.
- Use the Embedded Service component to add Salesforce Scheduler in a Salesforce Experience Cloud Community.
- Enable Salesforce Scheduler using the Embedded Service components in a Scheduler component, Live Agent Chat, or chatbot. Use Experience Builder and Lightning Template with standard Embedded Services components configuration.

Low Development Appointment Setup

- Enable Salesforce Scheduler on an external website. Testing is completed manually.
- This option allows for moderate customizations.
- Use Scheduler through the Embedded Service component.
- Add a Lightning Out dependency app to your external website that gives unauthenticated users access to your Inbound New Guest Appointment flow template.

  > **Note:** Embedded Service requires authentication, which could be either an end user who has gone through the best practice of authentication or an API User. Using Embedded Service does require an Experience Cloud site but doesn't require a site deployed to users. Finally, an Embedded Service can run on an external website.

Moderate Development Appointment Setup

- In this option, use custom code and APIs to customize and host Salesforce Scheduler on an external website. Testing can be automated.
- Add the ltng:allowGuestAccess interface to your Lightning Out dependency app to make it available to guest users on your external website.
  - This interface lets you build your app with Aura components, and deploy it anywhere and to anyone. If a user is authenticated with the Lightning Out endpoint, the session must be set in $Lightning.use().

- > **Note:** The ltng:allowGuestAccess interface is only usable in orgs that have Experience Cloud communities enabled. The Lightning Out app is associated with all Experience Cloud site endpoints that you've defined in the org.

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High Development Appointment Setup

- Create a custom scheduler component on an external website and automate testing.
- Use a Lightning Out dependency app to apply Lightning Web components or Aura components to manage screens and scheduling processes.
- Use REST API to gain full style control. The getAppointmentCandidates() and getAppointmentSlots() functions retrieve the appropriate candidates and appointment slots.
- Use Salesforce Scheduler Resources in Connect REST API to create service appointments, assignment of resources, and ability to create leads. Further customize user experience to filter or sort Service Territories using radius, latitude, longitude, sortBy, and sortOrder properties.

Virtual Shopping Experience

AppExchange packages provide options for extending Salesforce Scheduler capabilities, such as providing virtual customer engagements.

📝 Note: AppExchange solutions are reflective of third-party applications outside of Salesforce. Customers make their own determinations when picking a particular appexchange provider, select a partner that best meets your business needs.

AppExchange Partners:

Screenmeet

- Installing Screenmeet in your Salesforce Org
- APEX API Reference

Recursive Labs

- Data Sheet

SightCall

Glance

- Glance for Salesforce Setup Guide

Related Content

⬅ Review earlier steps in this solution.

- Understand the Schedule an Appointment Solution Workflow on page 162
- Recommended Technology on page 164

➡ Take the next steps in this implementation.

- Design Considerations

SEE ALSO:

Salesforce Architect Blog: Introducing the Architect Decision Guides

Design Considerations

Keep these design considerations in mind when you implement your appointment booking system.

Discovery

1. Craft a central vision by deciding on the scope of your changes, identifying a team, and defining key performance indicators.

2. Identify which tools offer the functionality or levels of customization that meet your requirements.

   - Consider the functional, performance, and scalability requirements.

3. Identify crawl, walk, run use cases and scenarios. Consider the following.

   Who

   Customers, guests, or unauthenticated users

   What

   - Will you schedule resources that are people or assets? People to schedule can include cashiers, sales reps, and curbside service agents. Assets can include room capacity, parking spaces, office spaces, or tangible items.
   - Consider whether resources have skills.

   How

   - Inbound Scheduler; Customer Self-Service to booking.
   - Outbound Scheduler; Scheduled by associates on behalf of a customer request.
   - Identify Accepted Channels: Website, Storefront, Chat, Chatbot, Self-Service Experience Cloud Community site, Customer Portal, or SMS.

   Where

   - Is the appointment virtual, in-store, for a parking spot, a scheduled room, or in some other location?
   - What locations, time zones, or other localized information are involved?

Key Cross-Cloud Considerations

Implement an appropriate cross-cloud engagement data model with Salesforce Scheduler. Unlock REST and SOAP API access across Commerce, Service, and Marketing Cloud. Seamlessly pass data attribute properties to systems for the workflows and use cases.

Salesforce Platform Keys

- Contact ID or Person Contact ID: Represents the business contact or the contact related to a person account.
- Account ID: Represents the account with which a contact is associated.
- Lead ID: By default, a lead is created when a guest books an appointment. We recommend converting leads to an account and contact or to a person account to verify the correct human profile for the scheduled engagement.

  📝 Note: Lead use can result in poor cross-cloud data quality. Converting leads to contacts creates duplicate keys in Marketing Cloud. To avoid duplicate records, never synchronize or send to leads via MC Connect. Use account and contact data or person account to better facilitate the data orchestration if the Marketing Cloud Connect feature is needed. To learn more about data modeling, review the Cross-Cloud Engagement Data Models solution kit.

Commerce Keys

- CustomerNo: The storefront-assigned customer number that represents the shopper.
- CustomerID: The internal Commerce Cloud identifier representing the shopper's customer profile.
- Contact ID or Person Contact ID: Represents the independent Contact or the Contact related to a Person Account.
- Site ID: Represents the storefront related to a given Customer List.
- Customer List ID: Represents a collection of B2C Commerce customer profiles.

Marketing Cloud

Subscriber Key / Contact Key: Represents the Marketing Cloud Contact and Subscriber.

Commerce Shopper APIs

The Shop API supports Shopper Persona, cart activities, and product detail pages. Shopper APIs are built for high-scale and usage within a storefront and are read-only APIs except for basket-related and order-related fields. Commerce Cloud Shopper APIs target the persona of a storefront shopper.

Use a customer's session identifiers to inspect their shopping session via Commerce Cloud's Open Commerce API (OCAPI). Obtain a session-grant via OCAPI using these dwsid and dwsecuretoken cookie values.

Customer session details are shared with Service to unlock interactions. If you're using Scheduler, Commerce Storefront Commerce Cloud enables customers to browse and use the site without logins.

📝 Note: Rescheduling and cancellation are only available to authenticated users as of Summer '20 Release. If using Salesforce Scheduler within a Commerce Storefront, use OCAPI JWT.

Performance and Scalability Considerations

- When using both Asset Scheduling and Event Management, calendar sync doesn't occur for appointments assigned to an asset-based service resource, as there's no underlying user record.

- Resource absences can be used to block availability for the asset-based service resource. For example, if the asset was unavailable due to other factors, like required maintenance.

- You can't set the owner of a service appointment to the underlying user of an asset-based service resource, as there's no underlying user.

- When planning to use Salesforce Scheduler and an integration to Event Synchronizing, use Einstein Activity Capture to sync contacts and events between Microsoft or Google applications and Salesforce.

- It isn't recommended to use Lightning Sync with Outlook. Users could incur limitations above 30,000 requests per hour. Starting in Winter '21, Lightning Sync isn't available to new Salesforce customers.

- Note high volume use cases up front to best design technical architectures and platform events or API strategies to facilitate high volume concurrent customer requests. Refer to the Salesforce Developer Limits and Allocations Quick Reference for more on limit considerations.

- Salesforce applies a limit on the number of API calls per 24–hour period. The limit is based on the Salesforce edition type and number of licenses. Consider timezone limitations on guest users.
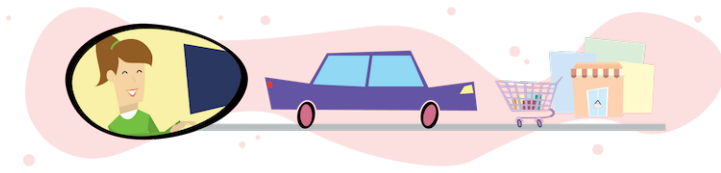
Related Content

← Review earlier steps in this solution.
- Understand the Schedule an Appointment Solution Workflow
- Recommended Technology
- Configurations

Facilitate Curbside Pickup

Prepare for the customer's arrival, fulfill curbside orders, and complete fulfillment without logging in to multiple systems.

Get Started

Explore system architecture related to this solution.

- B2C Industry Blueprint
- B2C Reference Architecture
- B2C Solution Architectures

Take Trailhead modules related to this solution.

- Salesforce Solution Kits: Quick Look
- Customer 360 Guide for Retail: Quick Look
- Customer 360 Guides: Quick Look

Every day, businesses see more buy online, pick up in store (BOPIS) orders and curbside pickups. Stores face new challenges as they learn to view new orders, pick products, and deliver them curbside. To meet customers needs, use digital engagement and B2C Commerce to orchestrate a smooth fulfillment and pickup process.

This solution kit helps you:

- Let customers opt in to SMS messaging for curbside delivery.
- Notify store associates about new orders and how to fill them.
- Better communicate with customers when they arrive.

Required Products

- Service Cloud Digital Engagement for SMS Channel
  - Service Cloud Chatbot (for inbound sessions)
  - Service Cloud Triggered Outbound Message (for automated outbound notification)
- Salesforce1 Mobile App
- Salesforce Chatter
- B2C Commerce (or other commerce platform)

Recommended Roles and Skills

- Certified Admin and Developers for Service Cloud, preferably with chatbot experience
- B2C Commerce Developers with experience in APIs and ISML templates
- Architects to oversee the flow of data between Commerce, OMS, and Service
- Business owners from Commerce, Service, and Retail teams to define requirements

Implement This Solution

Facilitate Curbside Pickup Workflow

Learn how data flows through the configurations to facilitate curbside pickup.

Design Considerations

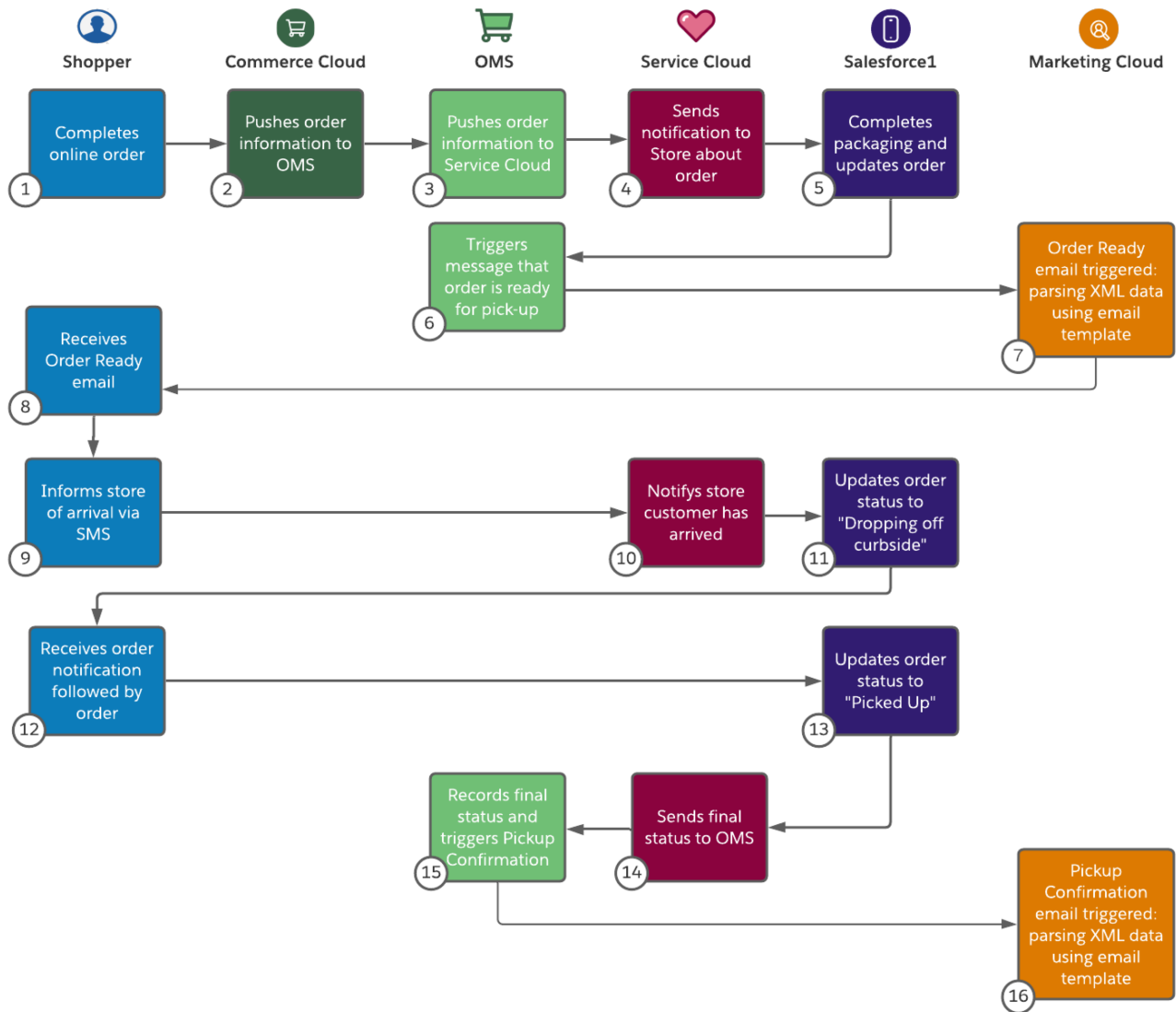Keep these design considerations in mind when you facilitate curbside pickup.

Configurations

Use these configurations to facilitate curbside pickup.

Facilitate Curbside Pickup Workflow

Learn how data flows through the configurations to facilitate curbside pickup.

Workflow

1. The customer completes an online order and gives consent to receive SMS for pickup info.

2. Commerce Cloud pushes the order and customer information to the Order Management System (OMS).

3. The Order Management System pushes the order and the customer's information to Service Cloud.

4. Service Cloud sends a notification to Salesforce1 Mobile App (the store associate) about the new order that's coming in.

5. The store associate completes the packaging and advances the order status in Service Cloud via Salesforce1 Mobile App.

6. The Order Management System triggers an API call to Marketing Cloud for the Order Ready message.

7. Marketing Cloud sends a triggered message to the customer notifying that the order is ready for pick-up.

8. The shopper receives the Order Ready email and heads to the store.

9. Shopper arrives at the store and sends a message to the SMS number with additional information such as car model and parking lot number.

10. Service Cloud sends a notification to the store associate via the Salesforce1 Mobile App notifying the customer has arrived.

11. A store associate updates the order status to "Dropping off to Curbside" via the Salesforce1 Mobile App.

12. The customer receives an order notification SMS with the estimated wait time, shortly followed by the curbside order delivery.

13. A store associate updates the order status to "Picked Up" via the Salesforce1 Mobile App after the order has been delivered curbside.

14. Service Cloud updates the Order Management System with the final Picked Up status.

15. The Order Management System sets the final Picked Up status, concludes the order, and triggers an API call to Marketing Cloud for the Pickup Confirmation message.

16. The Shopper receives their Pickup Confirmation email.

Related Content

Review this solution's use case and purpose.

- Facilitate Curbside Pickup on page 170

Take the next steps in this implementation.

- Design Considerations on page 173
- Configurations on page 174

Design Considerations

Keep these design considerations in mind when you facilitate curbside pickup.

Key Considerations

Licenses

The minimum license requirement for Service Cloud components includes:

- Platform licenses for store associates using the Salesforce1 mobile app
- One Service Cloud and one Digital Engagement license to set up text channels and chatbots
- A Volume license for another chatbot session, SMS session, and Outbound Messaging session consumption. Check with your account executive for potential RUL licenses.

- Purchase a separate SKU if a Short Code is required. It currently takes 10~14 weeks to provision a Short Code.

Einstein Bot

Although Bot actions can support more complex use cases, focus on the MVP bot in the first launch.

- Use a menu and button-driven bot first then add optional Natural Language Understanding capability later.
- Focus on the key flow first, such as Order Pickup, in the first release. End expand it to other potential use cases such as Order Cancellation for exception handling.

Exception Handling

The workflow in this solution kit explains a standard pickup process. But consider the following exceptions for production deployment.

- Customers can't opt in for text communication on the pickup option. We suggest that you either remove the curbside pick-up option for these customers or use an alternate channel. These customers can call the store or pick up in store.
- Customers can send a different person for pickup. We suggest that you build a bot to handle other identity verification processes.
- Customers can text the chatbot to request other services, such as canceling the order. We suggest that you expand the bot actions to handle other inquiry types. An MVP bot can direct the customer to contact the call center for other inquiry types at the initial Bot launch.

Performance and Scalability Considerations

- Note high volume customer requests upfront to best design technical architectures and platform events or API strategies. Refer to the Salesforce Quick Reference Guide for more on limit considerations.
- Salesforce applies a limit on the number of API calls per 24-hour period. The limit is based on the Salesforce edition type and number of licenses.
- Consider the effects of Carrier Filtering on your implementation. Review a definition of Carrier Filtering and best practices. Also consider the Messaging Regulations by Country.

Related Content

← Review earlier steps in this solution.

- Facilitate Curbside Pickup Workflow on page 172

→ Take the next steps in this implementation.

- Configurations on page 174

Configurations

Use these configurations to facilitate curbside pickup.

Commerce Platform

This Solution Kit recommends a general approach to implement simplified communication for store associates. Use a cross-cloud solution between B2C Commerce, the Order Management System, and Service Cloud to manage inbound and outbound communication to customers. Use the Salesforce1 Mobile App for store associates.

Customers place an order online for pickup at a retail location. This kit assumes that Buy Online Pick Up in Store (Or Curbside Pick Up) is already in place for your commerce platform. See the Buy Online Pick Up in Store (BOPIS) Solution Kit for guidelines on implementing this functionality on B2C Commerce.

To enable BOPIS functionality, update the following key areas depending on your current template design:

- The product detail page
- A cart that clearly shows which items are being picked up at which store location
- A checkout in which Ship To information requires a mobile phone number and consent to receive SMS messaging for transactional purposes
- The order confirmation, history, and details

Order Management System

Update integration to and from your existing Order Management System (OMS) to pass customer mobile phone and opt-in information. You aren't required to use Salesforce Order Management.

If you have B2C Commerce, see the following information on exporting orders and integrating with an OMS:

- Basic Order Management Integration Framework
- Exporting Order Data from B2C Commerce
- Customizing your Order Management Integration

Service Cloud

Service Cloud manages inbound and outbound communication to customers through a text channel and notifications to store associates.

1. Model Data
   - Create a lightweight Order custom object as a placeholder for Order data received from OMS. This lightweight custom object isn't meant to serve as a Master data source for order data. Salesforce can query external systems for order data. An on-platform object enables a native object-based features and optimized performance.
   - Optionally, create a Store custom object for store-specific information, such as directions, store hours, parking information, or approximate pickup wait time.

2. Provision a Text Channel (Toll-free number or short code required for business usage).

3. Set up Process Builder and necessary flow actions to create a chatter notification to associates in the specific store upon pick-up order creation.

4. Set up Process Builder and necessary flow actions to notify customers that the order is ready for pickup. Include specific store instructions such as the designated parking area.

5. Set up a chatbot and deploy it to the text channel. The chatbot is designed to help customers at the time of arrival. Use it to:
   - Identify the customer based on the known mobile number.
   - Find the pickup order based on the located customer record.
   - Take the customer's pickup details such as car model and parking space number.
   - To notify associates about customer arrival and other details gathered from the previous step, create a chatter notification.

6. Set up Process Builder and necessary flow actions to notify customers that an order is on its way to curbside. Notify customers as store associates advance the order status.

7. Configure integration and data upload to include:
   - Bulk data upload and maintenance of Store data (or integration from system record on store data).

- Add or update integration from existing OMS for order and customer data such as customer mobile phone and opt-in information.
- Add or update integration to OMS for final order status update.

Salesforce1 Mobile App

1. To advance order status, including status and optional custom messages to customers, create mobile publisher actions.

2. Update the Order Page Layout.

3. Configure Order List view and Sharing settings. Although store associates see notifications when a new order comes in, configure a list view so that they can view all orders in progress. You can require other sharing rules on the Order object so that the list view only shows orders being picked up from this store.

4. Enable Chatter notifications for store associates.

Related Content

Review earlier steps in this solution.

- Facilitate Curbside Pickup Workflow on page 172
- Design Considerations on page 173

See Also

- Stream Catalog Updates Through Collect Tracking Code

Offer Buy Online, Pick Up in Store (BOPIS)

Give shoppers more options by expanding a storefront to offer order pickup. Integrate Marketing Cloud for smooth post-purchase communications.

Get Started

Explore system architecture related to this solution.

- B2C Industry Blueprint
- B2C Reference Architecture
- B2C Solution Architectures

Take Trailhead modules related to this solution.

- Salesforce Solution Kits: Quick Look

- Customer 360 Guide for Retail: Quick Look
- Customer 360 Guides: Quick Look

Give shoppers more options by expanding a storefront to offer stock pickup. Integrate Marketing Cloud for smooth post-purchase communications.

This solution kit helps your shoppers:

- Reduce shipping costs.
- Receive merchandise faster.
- Take advantage of special discounts or promotions.

Required Products

B2C Commerce

- Salesforce B2C Commerce Storefront Reference Architecture (SFRA) or SiteGenesis
- If using SFRA, "Plugin_instorepickup" cartridge installed

Marketing Cloud

- Journey Builder
- Content Builder Interactive Email
- Cloud Pages
- Mobile Connect (Optional)
- Mobile Push (Optional)

Other System Requirements

- Salesforce Order Management, Enterprise Resource Planning (ERP), or another system that handles order management
- An inventory management system or the ability to send store inventory data via XML files to Salesforce B2C Commerce

Data Requirements

- Product Catalog, for any products you didn't already offer online and the BOPIS custom attribute
- Store Information Details, such as address, phone number, and hours
- If using B2C Commerce Geolocation API, Store Geolocation Data to power the store locator
- Store Inventory Data, including stock keeping units (SKU) by store

Recommended Skill Sets

- Marketing Cloud Email Specialist, preferably with Journey Builder experience
- Marketing Cloud Consultant
- Salesforce Commerce Cloud Certified Architect
- Salesforce B2C Commerce Cloud Certified Developer (front-end and back-end)
- Business owners from Commerce, Marketing, and Retail teams to define requirements

Implement This Solution

[Offer Buy Online, Pick Up in Store (BOPIS) Workflow](#)

Learn how data flows through the configurations when you let shoppers buy products online for local store pickup.

[Design Considerations](#)

Keep these design considerations in mind when you let shoppers buy products online for local store pickup.

[Configurations](#)

Use these configurations to let shoppers buy products online for local store pickup.

Offer Buy Online, Pick Up in Store (BOPIS) Workflow

Learn how data flows through the configurations when you let shoppers buy products online for local store pickup.

Workflow
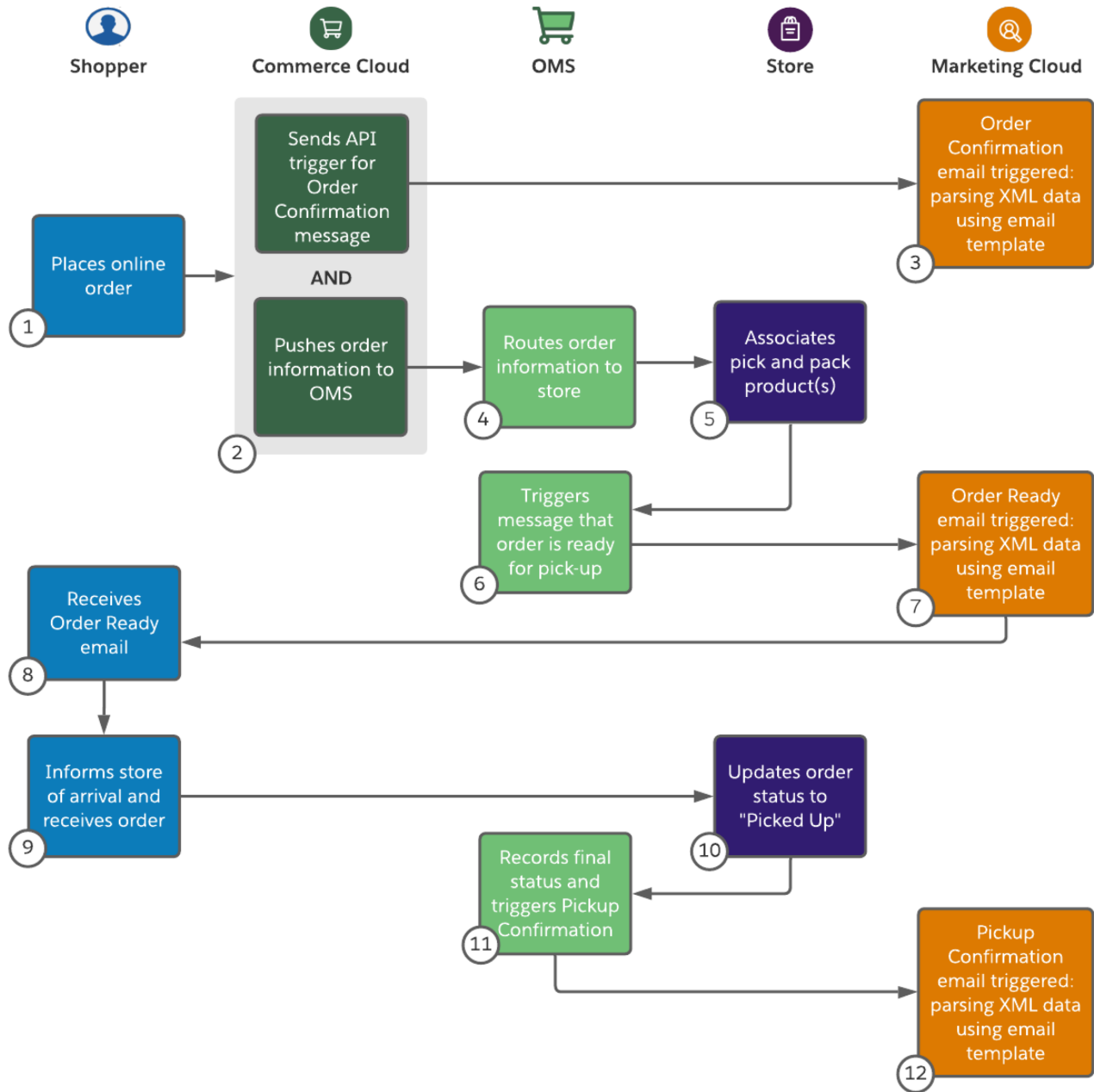
1. The shopper places an order on a B2C Commerce storefront, selecting store pickup from a local store that has available inventory.

2. B2C Commerce triggers an API call to send the Order Confirmation message through Marketing Cloud. The order is exported to an order management system (OMS) or other internal system that processes and routes orders.

3. Marketing Cloud sends an Order Confirmation email to the customer.

4. The order management system routes pickup orders to the appropriate physical store.

5. A store associate reviews the order via an app or on the order management system console. The associate picks and packs products to fill the order. The associate triggers an action to send an email notification to the customer that their order is ready for pickup with pickup instructions.

6. An API call triggers to Marketing Cloud to send the Order is Ready for Pickup message.

7. Marketing Cloud sends an Order is Ready for Pickup email to the customer.

8. The customer receives an interactive email that details pick up instructions.

9. Upon arrival at the store, the customer picks up their order using one of the methods provided. If the customer is conducting a contactless pickup, they click an "I have arrived" link in their email to notify the store of their arrival.

10. A store associate marks the order as complete.

11. An API call triggers to Marketing Cloud to send the Pickup Confirmation message.

12. Marketing Cloud sends a Pickup Confirmation email to the customer.

Example Data Flow

📝 **Note:** This diagram represents one of many potential examples of systems and types of data flows that support BOPIS.
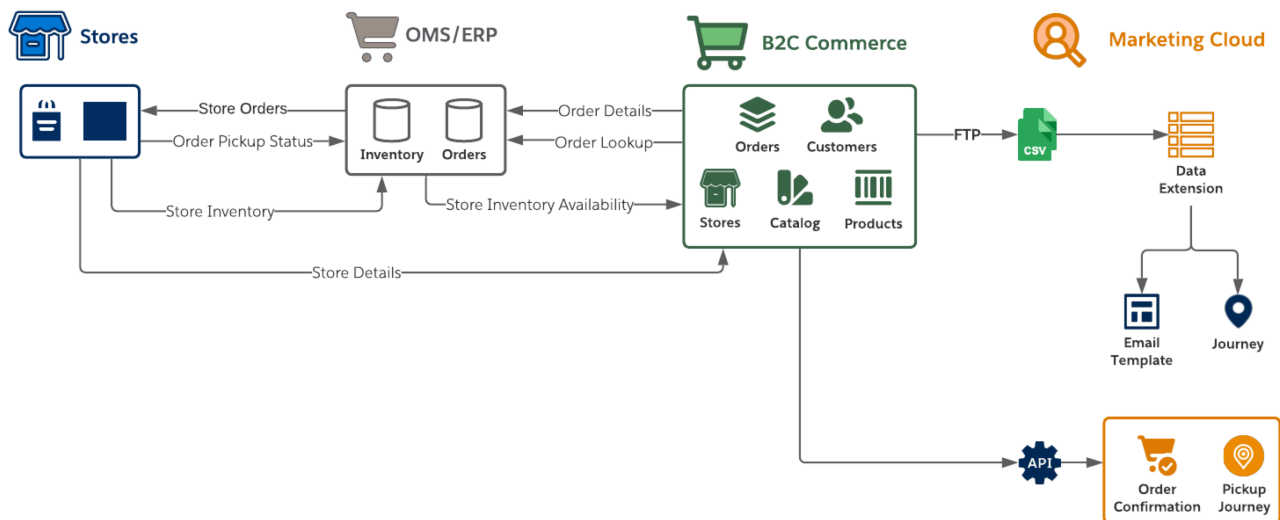
1. Collect the catalog, product, order, and customer data feeds from the B2C Commerce staging and production environments.

2. Move the data to the Marketing Cloud SFTP server and create Import activities so that Marketing Cloud consumes it on a schedule via Automation Studio.

3. Use B2C Commerce data in Marketing Cloud via data extensions when authoring email templates, creating journeys, and developing personalized product recommendations.

4. Extend the B2C Commerce Cloud storefront by replacing its email functions with the Marketing Cloud's trigger-send features. Implement framework customizations that trigger transactional emails for common storefront scenarios.

5. Implement and extend the Marketing Cloud collect.js through the storefront by using the reference implementation. Personalization Builder handles abandonment scenarios targeting search, cart, and checkout. To implement behavioral monitoring, ensure that Personalization Builder is licensed as part of Marketing Cloud.

6. To drive behavioral messaging, personalization, and segmentation in Marketing Cloud, use the shopper behavioral data collected from collect.js.

Functionality Considerations

This data flow configuration:

- Moves email authoring to Marketing Cloud's Email Studio.

- Supports delivery of B2C Commerce to trigger and Marketing Cloud to generate transactional email delivery.
- Enables email delivery via Marketing Cloud Journey Builder where B2C Commerce triggers the journey entry.
- Assumes that Marketing Cloud's interactive email form feature signals the customer's arrival for pickup.

Related Content

Review this solution's use case and purpose.

-

Take the next steps in this implementation.

-
-

Design Considerations

Keep these design considerations in mind when you let shoppers buy products online for local store pickup.

Key Questions

Stores

- Which stores offer buy online, pick up in store (BOPIS)?
- How many stores offer BOPIS?
- Can each store support the space and logistics of holding packages for customer pickup?
- Must stores offer curbside pickup?
- What extra training do store associates, call center agents, and merchants need?

Products

- Which system holds product data for store items that aren't in your online catalog?
- How do stores select which products to offer for BOPIS?

Inventory

- What system holds your store inventory and how to access it?
- What type of threshold or safety stock do you account for, and how do you maintain it?

Store Pick Up Considerations

The process for routing orders to stores depends on your specific systems and implementation, including:

- An in-store app that store associates use to receive orders and mark them as ready for pickup
- In-store access to viewing and updating orders in your OMS or ERP system
- A more basic process for getting the order information to your stores for associates to pick and pack

Regardless of the method, develop a clear process for Store Associates to handle order pickup, customer inquiries, returns, and other interactions. Plan to notify customers that orders are ready for pickup. When picked up, close the loop on the process and mark orders fulfilled.

For more information, see Communicate Store Changes and Schedule an Appointment.

Curbside Pickup Considerations

- Place clear signage where customers wait.
- Provide a store phone number to call or text when they arrive.
- To offer contactless delivery, have associates put packages in their trunk or have a location outside the store where associates can place packages for pickup.

Have dedicated staff to communicate with customers and take packages to their car. For more information, see Facilitate Curbside Pickup.

Performance and Scalability Considerations

If using Service Cloud, consider using a common profile across Marketing, B2C Commerce, and Core. To learn more, review Explore Cross-Cloud Engagement Data Models.

Other OOTB Design Options

While not required, this section describes some of the more common storefront enhancements that merchants use.

Surface the Store Locator in the Header

1. This placement draws attention to the Store Locator. The shopper searches for a store and selects it before they browse to a product detail page.

2. Clicking the Store Locator link opens a window or directs the user to the Store Locator page.

> **Note:** Use an AJAX request and data injection to store the ID in a cookie and load the selected store details into the header.

To identify products available for store pickup, add a filter on your product listing page.

1. Make this filter display with other PLP refinements managed in Business Manager.

2. On the product tiles, use the custom attribute to trigger the addition of a callout message. This message can indicate that a product is available for BOPIS, such as "Free In-Store Pickup."

> **Note:** This customization uses the availableForInStorePickup attribute on products. It determines whether a flag or callout message shows on a product tile to denote that an item is sold in stores. It's not a check for store inventory availability. That check happens only on the product detail page with a selected SKU.

Add a form field entry in Checkout for the shopper to specify an extra person to pick up the order.

> **Note:** Update your Order Export file by adding the additional data attributes.

Marketing Cloud Key Considerations

Consent Management

Honor and respect customer wishes when they request specific forms of contact from your company or opt out of certain types of data sharing. We provide Consent Management Details to help you determine the best way to comply with the data protection and privacy regulations that apply to your company.

> **Note:** This solution kit refers to sending transactional emails. To send promotional emails to the same subscriber, the subscriber must explicitly opt in to receive marketing communications. Similarly for Mobile Connect, the subscriber must explicitly opt in to receive marketing communications. MobilePush users must obtain consent for contacts to receive push messages.

Marketing Cloud Contact Model (Omni-Channel Messaging)

Contact Key

A single Contact Key manages and relates the contact through the different channels. The Contact Key is a unique identifier that you assign to a contact. If a subscriber gets an email and wants to be on mobile, the Contact Key adds the contact to the mobile channel. The Contact Key identifies a contact within an account and ties together the contact, channels, and the relationship. The Contact Key is the same no matter what channel is used to send messages.

The Contact Key allows you to connect contacts in multiple channels. Without the Contact Key, it would be difficult for Marketing Cloud to know to connect the contact because the contact has two different identifiers. Marketing Cloud processes the information as two different contacts in Contact Builder. Make sure that you're consistent across all channels when assigning a Contact Key to a contact.

Mobile Push

Set the Subscriber Key or Contact Key to the correct key in MobilePush.

There are several ways of setting the Contact Key on the MobilePush channel to be the Salesforce ID. One of the most common methods is to set up a backend service that syncs Salesforce IDs to an external system. When a mobile user identifies themselves in the app, the service figures out who they are and what their Salesforce ID is. The service returns that to the mobile app and sets it as the Contact Key.

Mobile Connect

When using the QueueMO opt-in method, the client specifies the Subscriber Key.

Related Content

Review earlier steps in this solution.

- Offer Buy Online, Pick Up in Store (BOPIS) Workflow on page 178

Take the next steps in this implementation.

- Configurations on page 183

See Also

- Communicate Store Changes
- Schedule an Appointment
- Facilitate Curbside Pickup

Configurations

Use these configurations to let shoppers buy products online for local store pickup.

The following configuration is for buy online, pick up in store (BOPIS) using B2C Commerce Cloud out-of-the-box (OOTB) functionality and storefront customizations. The steps here are for storefronts built with Storefront Reference Architecture (SFRA).

We also provide links to other supporting documentation on the B2C Commerce Cloud Documentation Portal and the B2C Commerce Cloud GitHub repository. For SiteGenesis, refer to the documentation on the infocenter for SiteGenesis in-Store Pickup, as there are some minor variations.

Install the Plugin and Supporting Metadata

Follow the instructions for getting started. Ensure that your instance has the proper system object extensions metadata to support the plugin, including the following object custom attributes:

- Product: availableForInStorePickup (boolean)

  When set to true, this attribute enables functionality to find a product in a store via the product detail page. It also determines when an InventoryList (or external API inventory ID) for a given store must have a ProductLineItem when added to the Basket.

- ShippingMethod: storePickupEnabled (boolean) determines if the shipping method shows as an in-store shipping method.
- Store: inventoryListId (string) stores an ID reference to a given store's associated inventory list (or external inventory ID when using an API). This inventory list determines product availability. Upon add to cart, associates with the ProductLineItem via the productInventoryListID attribute.
- ProductLineItem: fromStoreId (string) stores an ID reference to a given Store object on a line item level.
- Shipment: fromStoreId (string) stores an ID reference to a given Store object on a shipment level.
- Shipment: shipmentType (string)

  For shipments where this attribute is set to "instore," only shipping methods where storePickupEnabled = true are available.

Data Setup and Considerations

Products

Update your existing product feed to account for the availableForInStorePickup custom attribute.

Inventory

Choose different ways to retrieve store inventory data to power BOPIS functionality on your storefront.

- Regularly extract inventory data from your source system, and send it to B2C Commerce Cloud as XML formatted Inventory Lists. For the XML file format, refer to the inventory.xsd schema.
- Use APIs to call your source system when you must retrieve store inventory.

Stores

Add your store data in Business Manager, or import store information in an XML file. If importing via an xml file, follow the stores.xsd schema.

Another option for implementing the ability for a customer to shop a selected store is to use price books within B2C Enterprise. The steps to implement this code on your site are in the Shop By Store Github.

Geolocation

If using B2C Commerce Cloud API for Geolocation data, import all Store Geolocation data following the geolocation.xsd schema.

Use the following job steps to perform automated maintenance of your data:

- ImportInventoryLists
- ImportStores, if importing stores via XML
- ImportCatalog, to import updates to availableForInStorePickup attribute on products

Resolving Template Conflicts

With multiple plugins, you can resolve multiple template conflicts. Salesforce provides another cartridge, plugin_cartridge_merge, which provides a reference for how to merge together multiple plugins in a single customization cartridge. Refer to this cartridge for inspiration when considering the best way to implement plugins in your existing code base.

- Review the list of templates that override the base SFRA cartridge.
- Compare template code between app_storefront_base (main SFRA cartridge) and plugin_instorepickup (main BOPIS plugin cartridge). Use a comparison tool to compare the files for differences, or run a "diff" of the files.
- Copy the identified delta code added from the plugin_instorepickup cartridge to any customizations cartridge code that overrides it. If the templates being overridden don't exist in any cartridges other than app_storefront_base, don't copy those changes to any other cartridges. Instead, use the plugin_instorepickup cartridge's version of those templates.

    To view the expected cartridge stack, see SFRA Overview.

- To ensure that plugin features work correctly, test the storefront functionality, and review all logs for errors.

Storefront Template Customizations

With the in-store pickup cartridge installed, the Storefront Reference Architecture provides key out-of-the-box functionality and template code to support BOPIS. See the SFRA Wireframes Documentation. If using Site Genesis as your reference application, see the OOTB design and functionality for BOPIS in the Site Genesis Wireframes and Functional Spec Documentation.

The following are the key areas to update when enabling the OOTB BOPIS functionality. They depend on your current template design.

- Product Detail Page
- Cart
- Checkout
- Order Confirmation / Order History & Details

Other customized sections that further enhance the customer experience include:

- Header
- Product Listing / Search Results Page

To identify the customized areas, compare your current pages with the OOTB template designs. Look for areas that include elements to support BOPIS. This guide covers the minimum OOTB features to support BOPIS. Work with your technical teams and design teams to help identify areas where your storefront templates need adjustments. Support the functionality, and adhere to your brand's look and feel.

📝 **Note:** It's important to use clear and prominent messaging about the store pick-up process and FAQs.

As with any enhancements you make to your storefront, follow your organization's process for thoroughly testing. Ensure that your data is accurate. Test data flows across all systems. Make sure that impacted teams know about any changes to their process. Before launching your new BOPIS offering, ensure that all storefront functionality works as expected.

Marketing Cloud Configuration Steps

Trigger an Order Confirmation Email in the Marketing Cloud with the Marketing Cloud Transactional Email Solution Kit.

Create an "Order is ready for pickup journey" that uses an API event as its entry source. Inject the subscriber into the Marketing Cloud "Order is ready for pickup" journey when the order fulfills. Marketing Cloud's REST API offers you access to the Journey Builder API. You inject subscribers into a journey via an API call. Configure this REST service call to Marketing Cloud \using a B2C Commerce Cloud Service. The call uses the fire entry event method to inject a subscriber into the journey.

📝 **Note:** This call triggers from the order fulfillment page after the order processes in B2C Commerce Cloud or OMS.

Include the following required elements to make this journey an Omni-Channel journey. They send messaging that the order is ready to be picked up at the store. If your only channel is email, skip the mobile steps. If using only mobile, skip the email steps.

1. SMS Order is ready for pickup message

2. MobilePush Order is ready for pickup message

3. An interactive email with a button or a similar call to action that the consumer clicks to alert the service agent that they arrived. Add other identifying information like make and model of the car and parking location to this email.

4. An interactive landing page when the consumer clicks the button that:

   - Updates the OMS to indicate that the order is ready for pickup

   - Sends an SMS to a designated contact for the store using REST API

   - Sends an email to an alias at the fulfillment desk at the store

   - Updates the client system via API

5. A pickup confirmation email with the option to include a survey

Related Content

> Review earlier steps in this solution.
>
> - Offer Buy Online, Pick Up in Store (BOPIS) Workflow on page 178
> - Design Considerations on page 181

See Also

- Get answers to your questions from B2C Commerce experts and other customers via the B2C Commerce Trailblazer Community Group.

- Search and find specifications and technical info for all aspects of B2C Commerce on the Salesforce B2C Commerce Infocenter.

- Review the Calendar of upcoming Commerce Cloud learning opportunities.

- Salesforce Order Management

- Request a Commerce Cloud Accelerator.

- If you need expert guidance for planning your BOPIS solution, contact your Customer Success Manager to ask about Advisory Services.