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# Add D2C Commerce to B2B Commerce Set Up Guide

Salesforce, Spring '24





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# ADD D2C COMMERCE TO B2B COMMERCE

Configure your Salesforce settings to add D2C Commerce to an existing B2B Commerce implementation.

## [Enable Person Accounts](#)

Person accounts are required for B2C stores, which use them to represent shoppers who visit the store and purchase products. Person accounts are optional for B2B stores, which typically use business accounts that include multiple buyers. If your B2B store allows guests to purchase products, you must enable person accounts, or guest checkout fails.

## [Create a Shopper Profile](#)

A shopper is an external user with restricted permissions who can visit your B2C store and purchase products. You can create a profile to use for all shoppers visiting your store.

## [Configure Sharing Settings](#)

Configure default sharing settings for commerce objects.

## [Configure a Custom Domain and CDN](#)

Every B2B and B2C store, except a store created in a Developer Edition org or a B2B store created with an Aura template, must be associated with a custom domain that is configured to use the Salesforce content delivery network (CDN) partner. A custom domain and corresponding CDN are optional for a B2B store created with the Aura template, but we recommend them if broad access and high security are required.


## [Next Steps](#)


When you've completed the setup, you can import data and create and configure stores.

## Enable Person Accounts

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Person accounts are required for B2C stores, which use them to represent shoppers who visit the store and purchase products. Person accounts are optional for B2B stores, which typically use business accounts that include multiple buyers. If your B2B store allows guests to purchase products, you must enable person accounts, or guest checkout fails.

 **Note:** In some cases, when you add D2C Commerce to an existing B2B Commerce and Salesforce Order Management implementation, Person Accounts is already enabled. If so, skip these steps.

 **Important:** After Person Accounts is enabled, it can't be disabled. We recommend that you create a sandbox to preview how Person Accounts affect your Salesforce org.

1. Create the Business Account record type.

a. From Setup, in the Quick Find box, enter *Object Manager*, and then select **Account**.

b. Click **Record Types**.

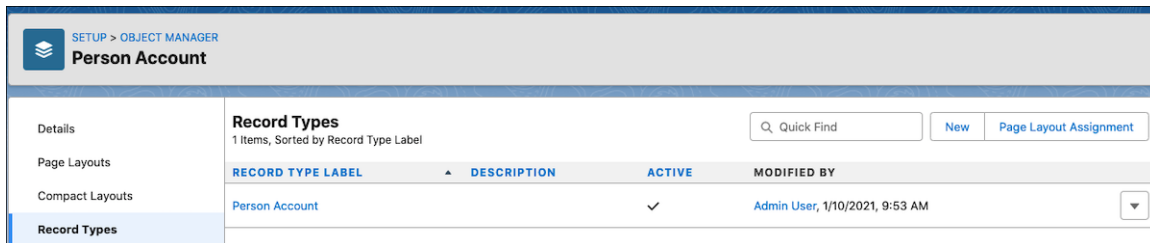
c. Click **New**.

d. For Record Type Label, enter a name (for example, *Business Account*).

You don't have to use Business Account as the name. However, keep in mind that this record type is used for businesses, not shoppers. After you create a Business Account, you can associate it with multiple contacts (individual employees working for the business).

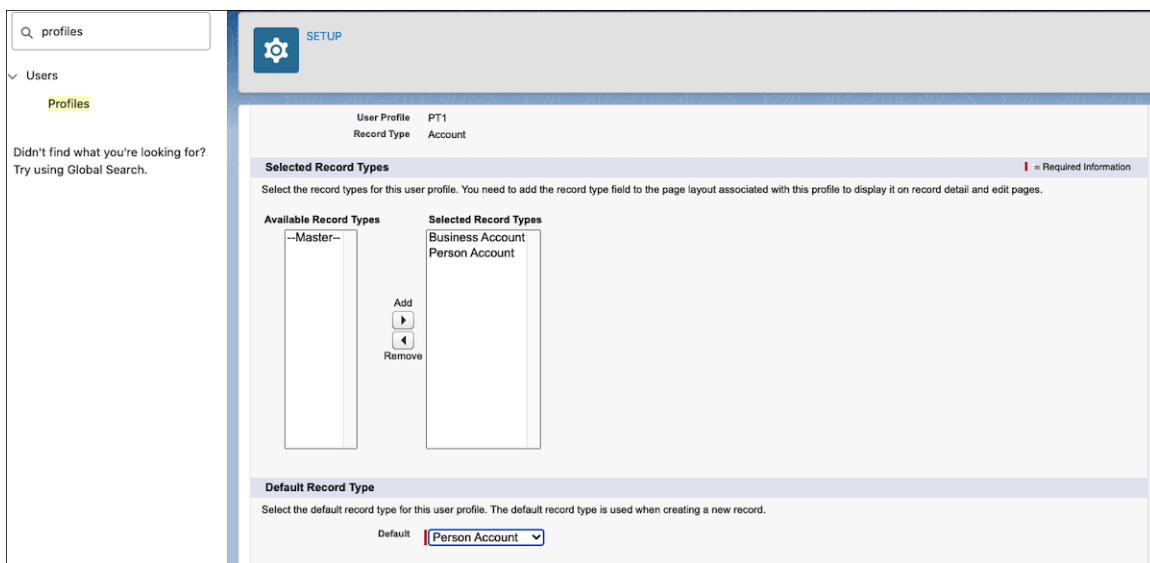
e. Click **Next**.

- f. Select a page layout, and click **Save**.
2. Enable Person Accounts.
    - a. From Setup, enter *Person Accounts* in the Quick Find box, and then select **Person Accounts**.
    - b. Go through the steps listed on the Setup page.
    - c. Turn on Person Accounts.
  3. Verify that Person Accounts are enabled.
    - a. From Setup, in the Quick Find box, enter *Object Manager*, and then select **Person Account**.
    - b. Click **Record Types**.
    - c. Verify that the Person Account record type is listed.



If you don't see the Person Account record type, contact Salesforce Support.

4. Configure the System Administrator profile.
  - a. From Setup, in the Quick Find box, enter *Profiles*, and then select **Profiles**.
  - b. Click **System Administrator**.
  - c. Scroll down to Record Type Settings, and read the text next to Accounts.
  - d. Click **Edit**.
  - e. Make sure that Business Account and Person Account are in the Selected Record Types list on the right.
  - f. Under Default Record Type, select **Person Account** as the default.



- g. Click **Save**.

## Create a Shopper Profile

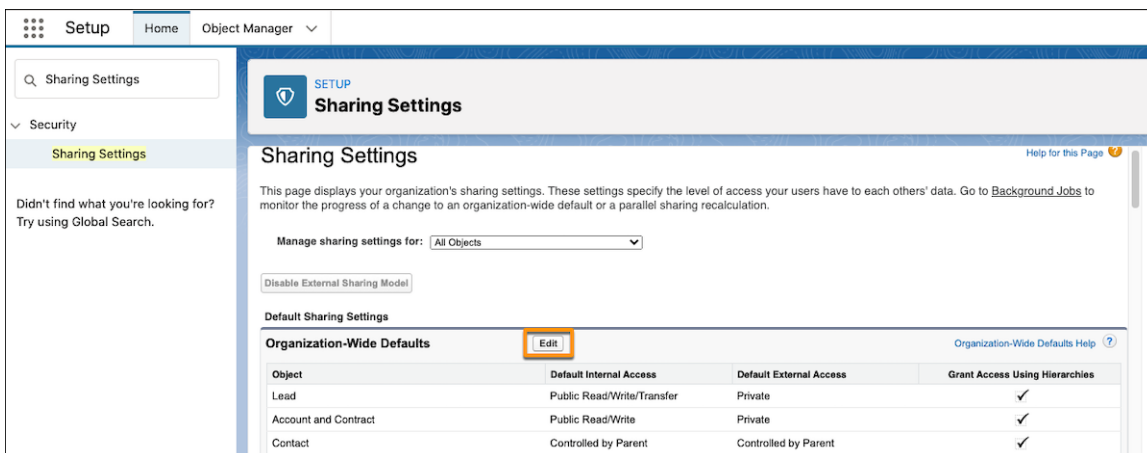
A shopper is an external user with restricted permissions who can visit your B2C store and purchase products. You can create a profile to use for all shoppers visiting your store.

1. Clone the External Apps Login User profile.
  - a. From Setup, in the Quick Find box, enter *Profiles*. Next to External Apps Login User, select **Clone**.
  - b. For Profile Name, enter *Shopper Profile*.  
You can choose another name, but keep in mind that this profile is used for your shoppers.
  - c. Click **Save**.
2. Create a shopper permission set group.
  - a. From Setup, in the Quick Find box, enter *Permission Set Groups*, and then select **Permission Set Groups**.
  - b. Click **New Permission Set Group**.
  - c. For Label, enter *Shopper PSG*.  
You can choose another name, but keep in mind that this permission set group is used for your shoppers.
  - d. Click **Save**.
  - e. On the Permission Set Groups page, in the Permission Sets section, click **Permissions Sets in Group**.
  - f. Select the **Shopper** permission set, and click **Add**.
  - g. Click **Done**.

## Configure Sharing Settings

Configure default sharing settings for commerce objects.



1. From Setup, in the Quick Find box, enter *Sharing Settings*, and then select **Sharing Settings**.
2. Under Organization-Wide Defaults, click **Edit**.



The screenshot shows the Salesforce Setup page for Sharing Settings. The left sidebar contains a search bar with 'Sharing Settings' and a navigation menu with 'Security' and 'Sharing Settings'. The main content area is titled 'Sharing Settings' and includes a 'Manage sharing settings for:' dropdown set to 'All Objects'. Below this is a 'Default Sharing Settings' section with an 'Organization-Wide Defaults' subsection. An 'Edit' button is highlighted in the 'Organization-Wide Defaults' section. Below the 'Edit' button is a table with the following data:

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓

3. Configure the default external access settings for objects.

Object	Default Access	B2B	D2C
Buyer Group	External	Private	Private
Catalog	External	Private	Private
Electronic Media Group	External	Public Read Only	Public Read Only
Entitlement Policy	External	Private	Private
Order	External	Private	Private
Order Delivery Method	External	Public Read Only	Public Read Only
Order Summary	External	Private or Controlled by Parent	Controlled by Parent
Product	External	Private  <b>Note:</b> For security purposes, set default external access to Private to prevent malicious actors from seeing product data that they aren't authorized to access.	Private  <b>Note:</b> For security purposes, set default external access to Private to prevent malicious actors from seeing product data that they aren't authorized to access.

4. Click **Save**.

## Configure a Custom Domain and CDN

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Every B2B and B2C store, except a store created in a Developer Edition org or a B2B store created with an Aura template, must be associated with a custom domain that is configured to use the Salesforce content delivery network (CDN) partner. A custom domain and corresponding CDN are optional for a B2B store created with the Aura template, but we recommend them if broad access and high security are required.

To serve your custom domain with the Salesforce CDN, your domain name must be a subdomain of a top-level domain. For example, if your top-level domain is example.com, your subdomain is something like store.example.com. Your top-level domain is registered and hosted externally from Salesforce. For more information, see [https://help.salesforce.com/s/articleView?id=sf.domain\\_mgmt.htm](https://help.salesforce.com/s/articleView?id=sf.domain_mgmt.htm)

1. Review the [considerations](#) for the Salesforce CDN.
2. Complete the [prerequisites](#) for a custom domain and the [prerequisites for the Salesforce CDN](#).
3. [Set up](#) a custom domain that uses the Salesforce CDN.

## Next Steps

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When you've completed the setup, you can import data and create and configure stores.

For information about getting your org ready to sell globally, see [Configure Salesforce for Global Stores](#).

For information about getting your org ready for asynchronous orders and handling PlaceOrderFailed exceptions, see [Preparing Salesforce for Asynchronous Order Processing](#).



For detailed help, see [Salesforce B2B Commerce and D2C Commerce](#).

To start working with products and stores, see these topics:

- [Import Data Globally Using a CSV File](#)
- [Store Creation](#)

To set up Salesforce Order Management, see [Salesforce Order Management Implementation Guide for B2B and D2C Commerce](#).

To set up Salesforce Omnichannel Inventory, see [Salesforce Omnichannel Inventory Implementation Guide](#).

For links to training and other resources, see [Commerce Resources](#).