Link Cart to Quote

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CONTENTS

LINK CART TO QUOTE

Integrate B2B Commerce carts with CPQ to allow sales representatives to finalize quotes and customers to complete orders.

Get Started

Take Trailhead modules related to this solution.

- [Salesforce Solution Kits: Quick Look](#)

This solution kit helps you:

- Integrate customer carts sent from B2B Commerce to CPQ for the Sales Rep to finalize and create complex quotes.
- Send quotes back to the cart for the customer to purchase or complete from CPQ.
- Reduce abandoned customer self-service transactions.

Required Products

- B2B Commerce Cloud
- Salesforce CPQ
- Sales Cloud, Service Cloud, or an Industry Cloud such as Consumer Goods Cloud or Manufacturing Cloud
- B2B Commerce and CPQ Connector

Implement This Solution

Workflow
Learn how data flows through the configurations to link cart to quote.

Design Considerations
For the best outcomes, keep these design considerations in mind. Links and other resources help you link carts to quotes.

Connector
Connectors are developer enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns. Use the CPQ B2B Commerce Cloud Connector to link cart to quote.

Configurations

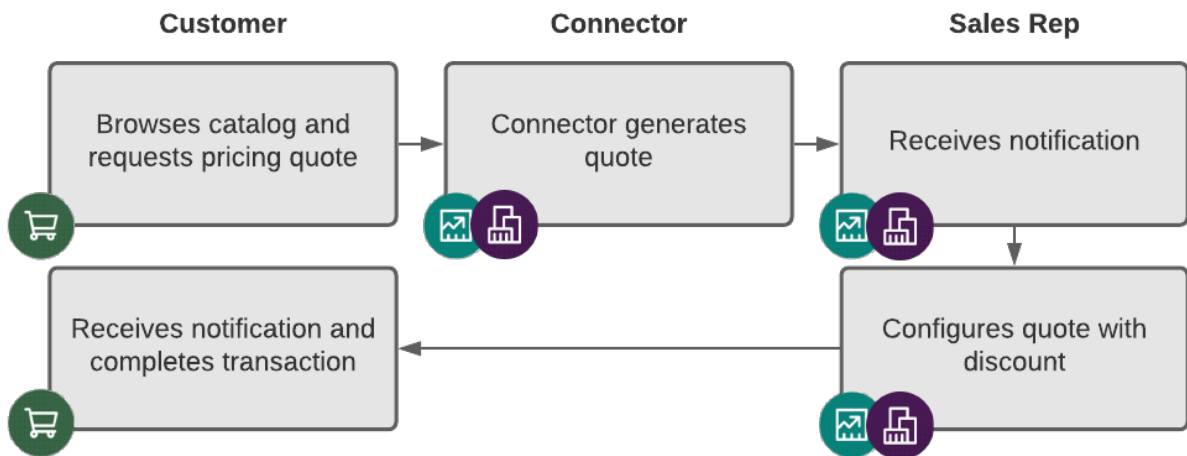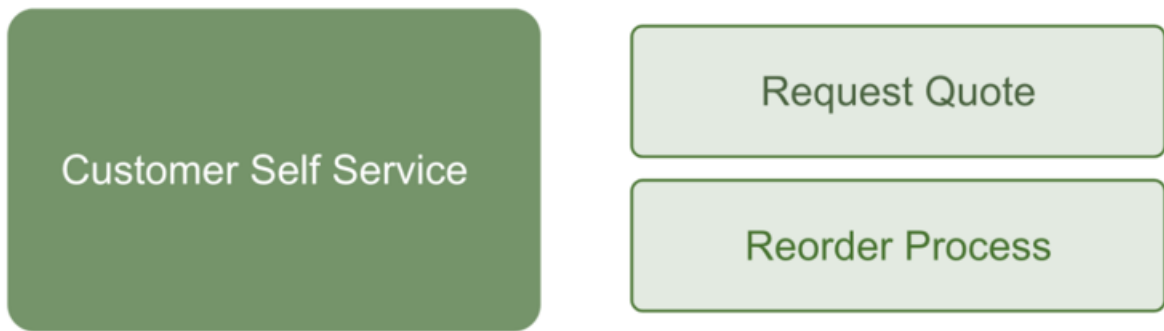Use these configurations to link carts to quotes.

Workflow

Learn how data flows through the configurations to link cart to quote.

Workflow

🛒 **Commerce**

Customer Self Service	**Request Quote**
	Reorder Process

Customer → **Connector** → **Sales Rep**

Customer	Connector	Sales Rep
Browses catalog and requests pricing quote	Connector generates quote	Receives notification
Receives notification and completes transaction		Configures quote with discount

Related Content

Take the next steps in this implementation.

- Design Considerations
- Connector

- Configurations

Design Considerations

For the best outcomes, keep these design considerations in mind. Links and other resources help you link carts to quotes.

Configuring the Marketing Cloud Connector Data Feeds

Best Practices

Identify Scope, Requirements, Validate Alignment

Plan for your budget, timeline, and out-of-the-box options.

- Plan and gather alignment on your data strategy and connected cloud. Consider your timeline and budget.
- Define an MVP solution by preparing a crawl, walk, and run prioritization for storefront and CPQ requirements.
- To implement new functionality, assign ownership of work items to cross-functional teams.

Monitor error logs, and subscribe to reports.

- Assign ownership for bugs, and issue tracking with a SLA across system, functional, and business analysis to monitor error logs between tools.

Validate your data strategy when adding to user stories or a business process.

- Refer to the Product and Price Master Data flow and Design Considerations for ERP. This solution kit assumes that you use the Product CPQ Master approach.

Key Considerations

Data from the Connector

- Storefront and Connector Orders also create Opportunities.
- Carts that generate quotes and quotes that generate carts don't require an Opportunity record.

Cart-to-Quote Requests

- Request Quote runs at any time from the customer's cart or the "CC Order" creation." Either way, CPQ makes Quote then Quote Items data after the storefront makes a request.
- After Request a Quote initiation from an Order, CPQ data populates in the following order: Opportunity, Quote, Quote Line Items and Order, and Order Items.

Limitations and Guardrails

Transfer Orders to Storefront Cart

- When a sales rep transfers a quote to a cart in the customer's view, a custom Lightning Action on the Quote page supports this action.

Cart-to-Quote Behavior with CPQ Price Rules and Overrides

- Exclude Quotes created from the Cart for any "Pricing rules" or "Quote Calculator Plugin (QCP)" overrides. The price published from "Cart to Quote" drives price overrides.

Performance and Scalability Considerations

Notifications

- Configure transactional alerts through the Cart-to-Quote or Quote-to-Cart notification preferences. Review out-of-the-box options within Salesforce for email delivery via Process Builder, Marketing Cloud Account Engagement (Pardot) with Sales Alerts (Salesforce Engage Alerts), or by Marketing Cloud. Learn more about native notification options.

Monitor and Manage the Error Log

- Cart Order and Quote errors appear in the CPQB2B Log object.
- Create reports by setting up a Custom Report Type. Monitor performance and swarm issues that negatively affect the customer shopping experience.

Permissions and Security

- Record ownership from Connector transactions. If your Salesforce storefront supports unauthenticated shopping, it creates CC Cart and CC Order under the logged in Salesforce Experience site user context or the Anonymous User Context.

See Also

- CPQ | B2B Connector Setup and Implementation Guide
- B2B Commerce Data Model
- Service Agent Order on Behalf Flow

Related Content

←	Review earlier steps in this solution. • **Workflow**
→	Take the next steps in this implementation. • Connector • Configurations

Connector

Connectors are developer enablement frameworks that accelerate cross-cloud integration by providing code, configuration, and implementation patterns. Use the CPQ B2B Commerce Cloud Connector to link cart to quote.

The CPQ B2B Commerce Cloud Connector is an unmanaged package from Salesforce Labs. It allows B2B Commerce and CPQ customers to configure or customize functionality. Sync products, pricing, quote requests, and orders in both clouds.

Use one data model, pricing engine, and a unified process built around customer engagement from CPQ. Create Omni-Channel customer-driven experiences.

The connector supports the following use cases:

1. Synchronize Product and Price Data
2. Convert Cart to Order

3. Request for a Quote

4. Buy Again with Synchronized Order History

General Connector Information

- Connectors are a developer enablement framework that accelerates cross-cloud integration. Connectors aren't a standalone product.
- Connectors support a core set of use cases and can be extended to support more customer-driven use cases.
- Connectors require customization and configuration in B2B Commerce and Salesforce CPQ.
- Plan your connector implementation with a data strategy and governance policy.

# What Your Company Can Do with This Connector

Each connection point supports a core set of use cases enabled individually through custom metadata configurations. These connections meet your specific business requirements. You can disable them as needed, such as for scheduled maintenance or data ETL activities.

- Product and Price book
- Cart and Quoting
- Orders and CC Order

📝 **Note:** See the following visualized data flows. You reduce system complexity with a unified master data, shared data model, and single source of truth.
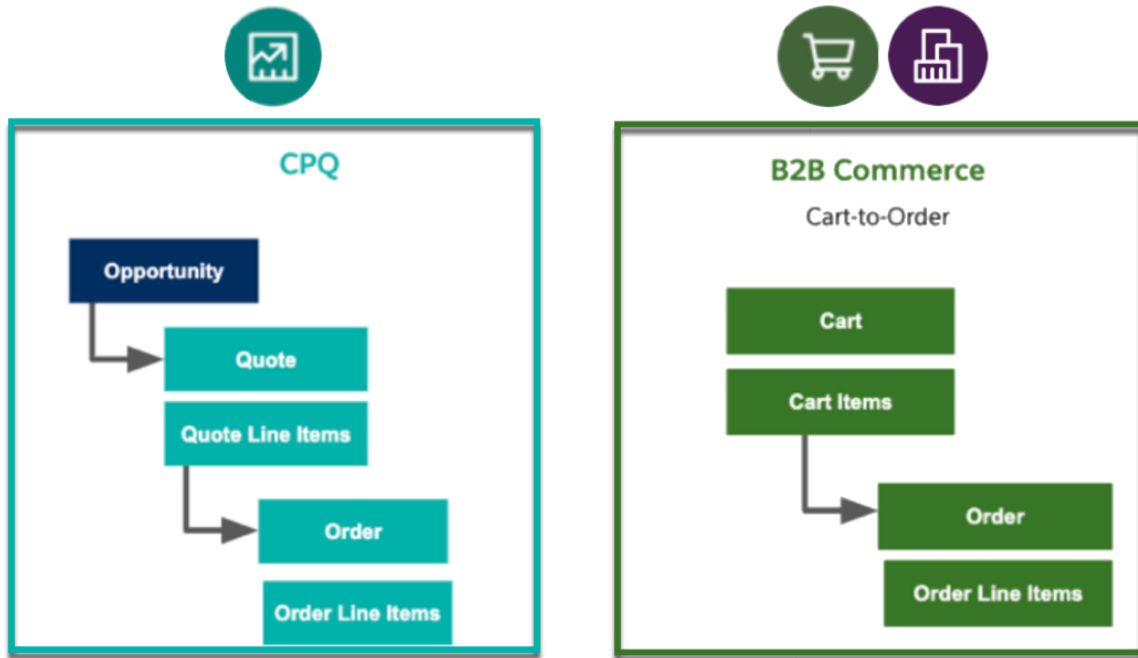
Connected Selling and Buying

Synchronize Quoting and Order History.
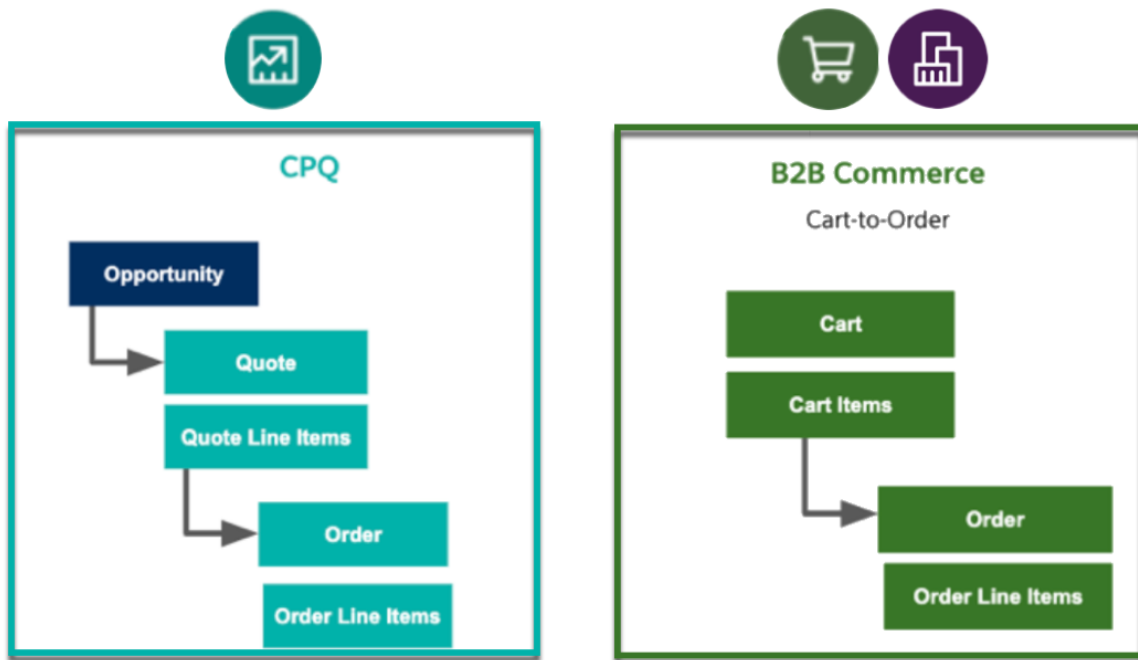
Connected Products and Pricing

Create CPQ Product and Price Data and Sync to B2B Commerce.

📝 **Note:** The CPQ + B2B Connector supports a one-way sync for Product and Pricing logic.

Table 1: Data Synchronization

Data Sync	Approach
Products and Pricing	• Platform Events • Scheduled Batch Classes • Queue-able Framework
Transactional Carts, Quotes, and Orders	• Triggers • Future Methods

Factors to Consider

- Volume of data (product catalog and price lists)
- Frequency of changes in business process impacting Pricing or Product Data
- Integrated systems and other data flows.
- Scalability and performance

Considerations

Product and Pricing Assumptions

The Connector lets you sync Simple Products with a flat price.

Connector Guardrails

Unsupported Product Types

To support the following B2B products, make other customizations in the Connector sync:

- Aggregate Products
- Assembly Products

Unsupported Complex CPQ Product Bundles

Without other customizations, we don't recommend using complex CPQ Product Bundles with many Options and Constraints. They're not ideal for using with self-service or the Connector.

B2B Product Entitlements

The Product and Pricing Sync process doesn't automate the B2B Product Entitlements. Associate The "Account Groups" to the "Price Lists" after completing the Product and Pricing Sync in B2B Commerce.

Discounts and Promotions

We recommend that you manage discounts and promotions for B2B Commerce in B2B. Don't sync the information from CPQ.

Data Strategy

Connector Data Flow Strategy and Governance

Advanced product and pricing capabilities within CPQ aren't available inB2B. For example, Bundles and Rules.

ERP as the Product and Pricing Master

Don't directly integrate B2B Commerce with the ERP. The functionality supported in the Connector and the approaches listed here assume that CPQ is the publishing data source for B2B Commerce.

Product Index Synchronization

Synced Products in B2B appear only in a Storefront after refreshing the Product Index.

Related Content

←	Review earlier steps in this solution.
	• Workflow
	• Design Considerations
→	Take the next steps in this implementation.
	• Configurations

Configurations

Use these configurations to link carts to quotes.

Prerequisites

This configuration requires a permission set assignment to CPQ B2B Connector Admin and the CPQ and B2B Commerce Administration areas. The steps here assume that you completed the Product and Pricing setup.

Package Settings

Configuration Steps

1. Enable Request a Quote.

   - Implement a customer message modal from Storefront (Buttons and Confirmation Page).
   - To edit storefront screens in the customer interface, update the Modal Metadata. To modify messaging, update the Custom Label "CPQB2B_CartToQuote_Confirm_Msg."

2. Implement a custom interface and button (optional).

3. Add the B2B Source field to the Quote Page Layout.

   Ensure proper Field Level Security requirements and layout updates per audience.

4. Adjust the Request a Quote cart status.

   Modify the Cart Status attribute by updating the "Source_Value__c" from the CPQ_B2B_Mapping metadata record CartStatusFieldUpdate.

5. Enable order syncing from the storefront.

   - Optionally, review your approach for Orders. Enable custom metadata to allow self-service customer orders to flow from the storefront to CPQ orders.
   - CC Order creates a new standard order record using the CPQ Quote API when the "Sync to CPQ" checkbox is checked or set to "true".

6. Configure the CC Order field update.

   Update the CC Order field. Set the "Sync to CPQ" field to "true" to meet necessary business requirements in the Process Builder or Workflow Rule.

7. Update Opportunity fields via the connector.

   In Custom Metadata, set the Opportunity Stage Mapping to the appropriate connector value.

8. After the opportunity, quotes created using the Connector populate.

   Connector updates the "Ordered" checkbox on the Quote and sets it to Primary to sync the quote with Opportunity.

9. Quotes populate Order and Order Item records when set to"Ordered."

   Configure the mapped Order status from the custom metadata settings.

10. Update the order page layouts.

    Use "B2B_Source_Order__c".

11. The connector creates the Order and Order item

    Configure the mapped Order status from the custom metadata settings.

   Note: Refer to the Implementation Guide for detailed instructions on Custom Metadata Mapping.

CPQ and B2B Commerce (CC objects) relationship fields:

CC Cart

- Opportunity__c
- Quote__c

CC Cart Item

- Product_Id__c (Use the formula data type to pull in "Product 2 Id" based on its mapping to "CC Product" on the Cart Item)

Opportunity

- CC_Cart__c

Quote

- CC_Cart__c
- CC_Order__c

Quote Line

- CC_CartItem__c

Order Item

- CC_CartItem__c

Quotes Metadata requires B2B Commerce Fields Sync:

Map values for Quote__r.CC_Cart__c, Quote__r.CC_Order__c on the Quote.

Update Quote__r.CC_Order__c on the Quote record when the CC_Order__c populates (if not created at the time of Quote creation).

Pricing on Quote Lines

Publish the pricing overrides on these fields on the "Quote Lines" when the Cart publishes Pricing details:

- SBQQ__SpecialPrice__c   The Cart Item price publishes it after any discounts or coupons.
- SBQQ__SpecialPriceType__c   Set the value as "Custom".

Subscriptions

Populate the following fields in the Quote lines for or Subscription products based on the defined Subscription Product Term (SPT)

- SBQQ__ChargeType__c   Set to "One-Time" for regular products and "Recurring" for Subscriptions.
- SBQQ__BillingFrequency__c   Set to "One Time" for regular products and "Upfront", "Monthly," or "Annual" for Subscriptions.
- SBQQ__BillingType__c   Set to "Advance" or "Arrears" for Subscriptions.

Related Content

Review earlier steps in this solution.

- Workflow
- Design Considerations
- Connector