



B2B Commerce and D2C Commerce

Salesforce, Spring '24



CONTENTS

Salesforce B2B Commerce and D2C Commerce	1
Basics	2
Prepare Your Org for Commerce	21
B2B and B2C Store Creation	30
Import and Export Commerce Data	37
Access	54
Products and Pricing	64
Commerce Checkout	101
Store Search	113
Search Engine Optimization (SEO) for Commerce	139
Commerce Einstein	152
Store Management	159
Commerce Promotions	181
Sell Globally	211
Store Customization	229
Publication and Activation	267
Index	272

SALESFORCE B2B COMMERCE AND D2C COMMERCE

Quickly create a customer-friendly B2B or B2C store. Take advantage of the store templates to create and customize your store with Experience Builder. Use standard Lightning functionality to set up checkout and payment and configure store settings. Define customer experiences, including search, carts, and checkouts. Import commerce data for accounts, products, price books, and entitlements using a CSV file.

Salesforce Mobile App

The Salesforce mobile app is designed for easy data access on the go. You can view Salesforce D2C Commerce record pages on the mobile app, but you can't access the Experience Builder tool.

Supported Editions

B2B Commerce is supported on Developer, Unlimited, Enterprise, and Performance editions. D2C Commerce is supported on Developer, Unlimited, and Enterprise editions.

Basics

Learn about D2C and B2B Commerce terms and concepts, personas, and licenses.

Prepare Your Org for Commerce

Use the Commerce Setup Assistant to automatically configure org preferences, sharing settings, object layouts, and other settings that optimize and enable your org for Commerce.

B2B and B2C Store Creation

The store is where shoppers and buyers go to view, select, and purchase your products. We provide B2B and B2C store templates to get you started. If you have an existing experience cloud site, you can add a B2B store to that site. You can add also sample data to a new B2B store to help you get started.

Import and Export Commerce Data

Import data, including products, product variations, and images, by uploading a CSV file. Data import occurs asynchronously, so after you start an import, you can perform other tasks. You can import data for a particular store or globally so that any store can access it. We recommend using the CSV file import process, but for large imports, use Data Loader. You can also export data for up to 300,000 products to a CSV file.

Access

For B2B and B2C stores, you specify which profiles and permission sets can access a store. For B2C stores, you can set up self-registration so that shoppers can create an account and log in. B2B stores don't allow self-registration. For B2B stores, use buyer contacts, accounts, and groups to specify which buyers can access the store as authenticated users. You can allow guest browsing for both B2B and B2C stores.

Products and Pricing

After you create your store, you can set up your products and pricing.

Commerce Checkout

Add checkout functionality to your B2B or B2C store. Set up payment, shipping, and tax calculation services. If you have a B2B store created with the Aura template, install and customize checkout flows.

[Store Search](#)

Get the most out of your store by helping shoppers find what they're looking for.

[Search Engine Optimization \(SEO\) for Commerce](#)

Search engine optimization (SEO) focuses on increasing non-paid search engine traffic for your site. Utilizing both creative and technical elements, you can improve search engine ranking and awareness, with the goal of driving more traffic to your B2B or B2C store.

[Commerce Einstein](#)

Commerce Einstein uses AI to automate tasks and personalize customer shopping experiences.

[Store Management](#)

Manage stores more efficiently using workspaces. Expand the reach of your store by enhancing language and currency support. Create and manage promotions to increase buyer incentive. Migrate store configurations, create custom reports, and manage existing integrations. Set up the emails that shoppers and buyers receive when they place an order, and what they see when your site isn't available. Review the steps required to use Omnichannel Inventory with commerce stores.

[Commerce Promotions](#)

Add promotions to your B2B or B2C store. Customize segments, discounts, qualifiers, and coupons to make sure that the right customers receive the right deals. Design your store pages and checkout flows to highlight promotions for eligible customers.

[Sell Globally](#)

Enable languages, translations, and currencies to expand the reach of your store to countries around the world.

[Store Customization](#)

Use Experience Builder to create and design the pages in your store. Choose a theme, and mix and match Lightning components to add content. Configure lists, menus, and other settings as needed.

[Publication and Activation](#)

When you've previewed your pages and are ready to start selling, it's time to make your store available to your customers. First, configure a custom domain and CDN. Assign the store a custom URL. Then publish the store and activate it.

Basics

Learn about D2C and B2B Commerce terms and concepts, personas, and licenses.

[Commerce Resources](#)

In addition to Salesforce Help, Commerce has documentation resources to help you successfully learn about, set up, administer, and extend the B2B and D2C Commerce apps.

[Key Concepts](#)

Get familiar with the main elements in B2B Commerce and D2C Commerce.

[B2B and D2C Commerce Licenses](#)

Purchase the right license for your commerce solution. You can use a license for B2B Commerce and Visualforce. You can also use a D2C Commerce license, or licenses for both B2B Commerce and D2C Commerce.

[Personas and Permissions](#)

A typical B2B or D2C Commerce implementation involves several task-based personas, such as commerce administrator, merchandiser, developer, and shopper.

[B2B and D2C Commerce Permission Sets](#)

Permissions determine the information users can access and the actions they can take when configuring or shopping at a store. Salesforce provides preconfigured permission sets, which define multiple permissions for internal and external users.

[Order Management and Omnichannel Inventory](#)

You can use Salesforce Order Management and Salesforce Omnichannel Inventory with B2B Commerce and D2C Commerce. Order Management helps you manage your orders throughout the order lifecycle, from creation to fulfillment to servicing. Omnichannel Inventory delivers real-time inventory availability data, helping you avoid costly undersells and oversells.

Commerce Resources

In addition to Salesforce Help, Commerce has documentation resources to help you successfully learn about, set up, administer, and extend the B2B and D2C Commerce apps.

What's New in Spring '24?

Learn about all the features delivered as part of this release.

[B2B Commerce and D2C Commerce Spring '24 Release Notes](#)

Help

[B2B Commerce and D2C Commerce Help](#) (PDF)

Developer Resources

[B2B Commerce and D2C Commerce Developer Guide](#) (HTML)

[B2B Commerce and D2C Commerce Developer Guide](#) (PDF)

[Salesforce Commerce Plug-In CLI Command Reference](#) (HTML)

[Connect REST API Developer Guide](#)

[Apex Reference Guide](#)

[B2B Commerce Aura to LWR Migration Guide](#)

Trailhead

[Get Started with Salesforce B2B](#)

[Get Started with D2C Commerce](#)

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited,** and **Developer Editions**

Available in: B2B Commerce and D2C Commerce

Videos

[Sell Direct to Consumers with Salesforce D2C Commerce](#)

[Get to Know B2B Commerce](#)

Related Resources

[Salesforce Order Management \(Help\)](#)

Key Concepts

Get familiar with the main elements in B2B Commerce and D2C Commerce.

Term	Description
B2C Store or B2B Store template	The template includes pages, theme layouts, and components to help you create a shopper experience. Showcase your products using the styles and layouts, and give shoppers an easy path to browse, add products to a cart, check out, arrange delivery, and track orders.
Buyer group	A buyer group is a collection of buyer accounts that have common access to specific entitlements. (D2C Commerce only) During your initial data import, a default buyer group is assigned to your B2C store.
Buyer Account	(B2B Commerce only) A buyer account gives a user purchasing access to a store. The account is associated with B2B entities, like price books and entitlements, that define the behavior of the account. A buyer account is a customer account that's enabled as a buyer and added to a buyer group.
Catalog	A catalog contains the hierarchical structure for the categories that classify your products in the store. To view products, you associate a catalog with the store. A store can have only one catalog. (D2C Commerce) During your initial data import, a default catalog is assigned to your B2C store.
Category	Use categories to organize products and make them easier to find. A category can contain up to five levels of subcategories and can belong to only one catalog.
Entitlement policy	An entitlement policy defines the products and product-related information that shoppers can see based on their buyer group membership. (D2C Commerce) During the initial import, a default entitlement policy is assigned to the B2C store.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

Inventory	(D2C Commerce only) Physical products available for ordering. D2C Commerce can integrate with Salesforce Omnichannel Inventory to track available inventory at one fulfillment location.
Order	(D2C Commerce only) An order is a list of purchased products. You can manage and service orders using a subset of the features of Salesforce Order Management.
Price adjustment schedule	Use a price adjustment schedule to create a tiered pricing structure for your shoppers. Tiered pricing assigns discounts based on volume. The more a shopper buys of one product type, the lower the price.
Price book	A price book tracks the product prices that your store offers to shoppers. Create a custom collection of products with associated original prices, and assign it to specific stores or buyer groups. (D2C Commerce only) During your initial data import, default Standard Price, Original Price, and Sale Price books are assigned to your B2C store.
Price book entry	A price book entry is a product with a price that is listed in a price book. Each price book entry specifies a currency for the price.
Product	A product is an item or service that you sell. You can display a given product in more than one store catalog.
Product media	You can enrich your product offerings with images, URLs, and PDFs. A given product can include up to nine images.
Product variation	A simple product is a product with one version—no different sizes, colors, or materials. A product variation contains a parent product and child variations of that parent. For example, <i>tee shirt</i> is a parent product, and <i>tee shirt blue XL</i> , <i>tee shirt red S</i> , and <i>tee shirt Green XXL</i> are child variations of that parent. Each child variation product has its own SKU.
Search	From the moment that you create a record in Salesforce, the search engine works to make your information easy to find. In a B2B or D2C Commerce environment, you can search for products against a product's discoverable fields.
Search filter (facet)	A filter makes it easier for shoppers to discover the product that they're looking for. You add filters by selecting fields from a product record. For example, you can select the product field representing an item's color. Then shoppers can filter their search results by the color values that you provide. The only product field that you don't select as a filter is Product Category. The Product Category field is a filter by default and can't be removed.
Search indexing	Search indexing is a process that the store admin runs after updating the store so that the index reflects the changes. Some changes that you make to your store don't appear until they're indexed.
Shopper account	(D2C Commerce only) An account that gives a shopper purchasing access to the store. The account is associated with D2C Commerce entities, like price books and entitlements, that define the behavior of the account. A shopper account is typically created when the shopper self-registers in the storefront. All shoppers must be represented by person accounts.
Store	A store is a container for all your commerce data, including catalogs, categories, price books, and products. All B2C and B2B stores use an Experience Cloud site for the front-end shopping experience to showcase your

products, arrange information for shoppers, and process orders. You can create multiple stores to serve different business areas or regions.

SEE ALSO:

[Commerce Resources](#)

[Personas and Permissions](#)

B2B and D2C Commerce Licenses

Purchase the right license for your commerce solution. You can use a license for B2B Commerce and Visualforce. You can also use a D2C Commerce license, or licenses for both B2B Commerce and D2C Commerce.

[B2B Commerce Licenses and Allocations](#)

A B2B Commerce license is based on either your anticipated gross merchandise volume (GMV) or the number of orders placed to your store (PPO). You can also buy a license for an additional storefront.

[D2C Commerce Licenses and Allocations](#)

A D2C license is based on either your anticipated gross merchandise volume (GMV) or the number of orders placed to your store (PPO). You can also buy a license for an additional storefront.

[Connected Commerce Licenses and Allocations](#)

A Connected Commerce license covers both B2B Commerce and D2C Commerce. It's based on your anticipated gross merchandise volume (GMV). You can also buy a license for one additional B2B store and one additional B2C store.

B2B Commerce Licenses and Allocations

A B2B Commerce license is based on either your anticipated gross merchandise volume (GMV) or the number of orders placed to your store (PPO). You can also buy a license for an additional storefront.

Legacy Licenses

We updated the licenses for B2B Commerce in July 2022. If those updates don't apply to you, see [Legacy Licenses for B2B Commerce for Visualforce \(Classic\) and B2B Commerce](#) for information about your license. If you're unsure about which license information you need, contact your Account Executive.

Licenses and Related Limits

This table lists the licenses available for B2B Commerce. You can purchase as many licenses as you need, but you can't mix and match licenses, for example, a starter and a growth license or a PPO and GMV license.

Some limits shown in the table are per license. For example, one B2B Commerce Starter (PPO) license includes 1,000 store orders. If you buy six B2B Commerce Starter (PPO) licenses, you get 6,000 store orders. However, the number of stores and number of permission sets for internal users is per purchase. No matter how many B2B Commerce Starter (PPO) licenses you buy, you get 2 stores and 1,000 permission sets for internal users.

GMV that must be converted to your contract currency is converted using the average exchange rate in effect on the day the order is processed.

EDITIONS

Available in: Salesforce Classic (not available in all orgs), Lightning Experience, and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer Editions**

Available in: B2B Commerce

Table 1: What's Included in Each License

License	B2B Commerce Starter (PPO)	B2B Commerce Growth (PPO)	B2B Commerce Starter (GMV)	B2B Commerce Growth (GMV)	Additional Store
Number of Store Orders	1,000 per license	1,000 per license	NA	NA	NA
GMV Amount	NA	NA	1,000 per license	1,000 per license	NA
Number of Stores	2	10	2	10	1
Permission Sets for Internal Users	1,000	1,000	1,000	1,000	NA
Extra Platform Cache Space per Org	20 MB	80 MB	20 MB	80 MB	NA
Extra Data Storage per Org	NA	10 GB	NA	500 MB	NA
Extra File Storage per Org	NA	50 GB	NA	20 GB	NA
Extra API Calls per Day, per Org	NA	2,000	NA	20	NA
Number of Unmanaged Order Summaries	1,000 per license, store orders only	4,000 per license, can include store orders and multichannel orders	10 per license, store orders only	40 per license, can include store orders and multichannel orders	NA

Definitions That Affect Licenses

Order

A record of the activated Order Summary object that's created, modified, and processed in B2B Commerce before entering your order fulfillment system. Any order created from the store user interface, B2B Commerce APIs, or other related services must be created using this object.

Multichannel Order

An order record that originates from a system outside of B2B Commerce and is imported into an Order Summary object. For example, a multichannel order can originate from an electronic data interchange (EDI) system and can be uploaded to an Order Summary object using Data Loader. Multichannel orders count towards the number of Unmanaged Order Summaries.

Active Store

A store in a production org created with B2B Commerce.

Platform Cache

Memory layer in Salesforce that helps improve performance when querying certain org and session data. Your org provides a certain amount of space in the platform cache. A B2B Commerce license provides extra space. You can allocate the extra space for caching certain types of storefront data.

B2B Commerce External User

A buyer who logs in to an account on your storefront or store and browses and purchases products. An external user can't be personnel from your company.

Licenses for Internal Users

For internal users, you can assign a Salesforce standard license or an Identity license paired with either the Commerce Admin or the Merchandiser permission set. You can also use a Sales cloud or Service cloud standard user license paired with the Commerce Admin or the Merchandiser permission set.

Licenses for External Users

Purchase enough licenses for external users to support the authentication and purchasing activity that you expect on your storefront.

B2B Commerce External User License (Member-Based)

- For buyer users—A Customer Community license gives users the minimum access to use B2B Commerce features.
- For buyer managers or buyers who need access to other buyers—A Customer Community Plus or higher license is required to access other buyers, role-based sharing, reports, and other objects beyond B2B Commerce objects.

B2B Commerce External Login License (Login-Based)

- For buyer users—A Customer Community Login license gives users the minimum access to use B2B Commerce features.
- For buyer managers or buyers who need access to other buyers—A Customer Community Plus Login or higher license is required to access other buyers, role-based sharing, reports, and other objects beyond B2B Commerce objects.

For information about B2B Commerce External Logins (Per Month) licenses for the Enterprise, Performance, and Unlimited Editions, refer to the information about the Customer Community Plus Login license at [Experience Cloud User Licenses](#).

You can also apply any licenses that you've already purchased toward your B2B Commerce activity. For more information about which licenses to purchase to support your storefront activity, contact your account executive.

SEE ALSO:

[D2C Commerce Licenses and Allocations](#)

[Personas and Permissions](#)

D2C Commerce Licenses and Allocations

A D2C license is based on either your anticipated gross merchandise volume (GMV) or the number of orders placed to your store (PPO). You can also buy a license for an additional storefront.

Legacy Licenses

We updated the licenses for D2C Commerce in July 2022. If those updates don't apply to you, see [Legacy Licenses](#). If you're unsure about which license information you need, contact your Account Executive.

Licenses and Related Limits

This table lists the licenses available for D2C Commerce. You can purchase as many licenses as you need, but you can't mix and match licenses, for example PPO and GMV licenses.

Some limits shown in the table are per license. For example, one D2C Commerce Starter (PPO) license includes 1,000 store orders. If you buy six D2C Commerce Starter (PPO) licenses, you get 6,000 store orders. However, the number of stores and number of permission sets for internal users is per purchase. No matter how many D2C Commerce Starter (PPO) licenses you buy, you get 2 stores and 1,000 permission sets for internal users.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer Editions**

Available in: D2C Commerce

GMV that must be converted to your contract currency is converted using the average exchange rate in effect on the day the order is processed.

Table 2: What's Included in Each License

License	D2C Commerce Starter (PPO)	D2C Commerce Starter (GMV)	Additional Store
Number of Store Orders	1,000 per license	NA	NA
GMV Amount	NA	1,000 per license	NA
Number of Stores	2	2	1
Permission Sets for Internal Users	1,000	1,000	NA
Number of Unmanaged Order Summaries	1,000 per license, store orders only	10 per license, can include store orders and multichannel orders	NA
Order Management Lite	5 per license	1 per license	NA
Omni Channel Inventory Location	1	1	NA

Definitions That Affect Licenses

Order

A record of the activated Order Summary object that's created, modified, and processed in D2C Commerce before entering your order fulfillment system. Any order created from the store user interface, D2C Commerce APIs, or other related services must be created using this object.

Multichannel Order

An order record that originates from a system outside of D2C Commerce and is imported into an Order Summary object. For example, a multichannel order can originate from an electronic data interchange (EDI) system and can be uploaded to an Order Summary object using Data Loader. Multichannel orders count towards the number of Unmanaged Order Summaries.

Active Store

A store in a production org created with D2C Commerce.

Licenses for Internal Users

For internal users, you can assign a Salesforce standard license or an Identity license paired with the Commerce Admin or the Merchandiser permission set. You can also use a Sales cloud or Service cloud standard user license paired with the Commerce Admin or the Merchandiser permission set.

Licenses for External Users

By default, 100,000 External Apps Login licenses are included for shoppers. If you need more than 100,000 External Apps Login licenses, work with your account representative to obtain the licenses you require. If your shoppers need licenses with a higher level of privilege, such as Customer Community Plus licenses, work with your account representative to upgrade your licenses.

SEE ALSO:

[B2B Commerce Licenses and Allocations](#)

[Personas and Permissions](#)

Connected Commerce Licenses and Allocations

A Connected Commerce license covers both B2B Commerce and D2C Commerce. It's based on your anticipated gross merchandise volume (GMV). You can also buy a license for one additional B2B store and one additional B2C store.

Licenses and Related Limits

This table lists what's included in the Connected Commerce license.

GMV that must be converted to your contract currency is converted using the average exchange rate in effect on the day the order is processed.

Table 3: What's Included in Each License

License	Connected Commerce	Additional Store
GMV Amount	1,000 per license	NA
Number of Stores	2 B2B and 2 B2C stores	1 additional B2B store and 1 additional B2C store
Permission Sets for Internal Users	1,000	NA
Number of Unmanaged Order Summaries	1,000 per 1 quantity of GMV	NA
Salesforce Payments	Included	NA
Order on Behalf	Included	NA

Licenses for Internal Users

For internal users, you can assign a Salesforce standard license or an Identity license paired with the Commerce Admin or the Merchandiser permission set. You can also use a Sales cloud or Service cloud standard user license paired with the Commerce Admin or the Merchandiser permission set.

Licenses for External Users

By default, 100,000 External Apps Login licenses are included for shoppers. If you need more than 100,000 External Apps Login licenses, work with your account representative to obtain the licenses you require. If your shoppers need licenses with a higher level of privilege, such as Customer Community Plus licenses, work with your account representative to upgrade your licenses.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Personas and Permissions

A typical B2B or D2C Commerce implementation involves several task-based personas, such as commerce administrator, merchandiser, developer, and shopper.

Persona	Description	Permissions
System administrator	Performs Salesforce configuration tasks. For example, the system administrator creates and configures user accounts and enables digital experiences.	The system administrator is a high-level Salesforce admin with access to setup functionality, including tasks related to users, profiles, and object management.
Commerce administrator	Performs D2C Commerce administration tasks, including site configurations and permissions. For example, the commerce administrator creates stores and assigns members to stores.	We provide a Commerce Admin permission set, which you can pair with the Identity user license. You can also clone and modify the permission set for your own implementation.
Merchandiser	Designs and manages the storefront. Executes and maintains the best way to display and sell products. For example, the merchandiser imports products and configures search.	We provide a Merchandiser permission set, which you can pair with the Identity user license. You can also clone and modify the permission set for your own implementation.
Order Management administrator	Performs Order Management tasks. For example, servicing returns.	Use a permission set that has the Salesforce Order Management permission license and permission to the Order Management console app. Pair the permission set with the Identity user license.
Inventory manager	Configures and manages inventory functions using Omnichannel Inventory.	We provide an Omnichannel Inventory Manager permission set, which you can pair with the Identity user license. You can also clone and modify the permission set for your own implementation.
Developer	Customizes the storefront and implements advanced features. Builds and develops the commerce experience and apps. For example, the developer uses APIs to	The permissions required depend on the tasks that the developer performs for your implementation.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

Persona	Description	Permissions
	integrate a third-party application or uses code to develop a custom component.	
Buyer manager	(B2B stores only) Manages multiple buyers within a buyer account and multiple buyer accounts.	We provide a buyer manager permission set for external user accounts. You can also clone and modify the permission set for your own implementation.
Buyer	(B2B stores only) Purchases products or services for organizations to use or resell. An external user who is registered on your storefront and can view and purchase products.	We provide a buyer permission set for external user accounts. You can also clone and modify the permission set for your own implementation.
Shopper	(B2C stores only) An external user who is registered on your storefront and can view and purchase products.	We provide a shopper permission set for external user accounts. You can also clone and modify the permission set for your own implementation.
Guest customer	An external user who can view and purchase products from your storefront but isn't registered.	As part of configuring your store, you can set up guest access to enable guests to shop on your storefront.

SEE ALSO:

[B2B and D2C Commerce Licenses](#)

[B2B and D2C Commerce Permission Sets](#)

B2B and D2C Commerce Permission Sets

Permissions determine the information users can access and the actions they can take when configuring or shopping at a store. Salesforce provides preconfigured permission sets, which define multiple permissions for internal and external users.

[Guidelines for Assigning Permission Sets](#)

We recommend that you assign permission sets to users that grant them only the required permissions to carry out their jobs.

[View Permission Set Overviews](#)

The permission set overview page gives detailed information about permission set functionality. From there, view settings such as Object Settings, Flow Access, and System Permissions.

[Preconfigured Permission Sets for B2B and D2C Commerce](#)

Users assigned to preconfigured permission sets receive permissions according to their persona's required functionality. You can customize these permission sets by cloning them and modifying individual permissions.

[B2B and D2C Commerce Integrator Permissions](#)

Salesforce provides several system permissions that enable users to integrate their B2B and B2C stores with third-party applications.

[Default Object CRUD Permissions for B2B and D2C Commerce](#)

You can perform Create, Read, Update, and Delete (CRUD) operations on objects in your org depending on your permissions. Users assigned to preconfigured permission sets receive CRUD permissions according to their persona's required functionality.

Guidelines for Assigning Permission Sets

We recommend that you assign permission sets to users that grant them only the required permissions to carry out their jobs.

Follow these guidelines when assigning permission sets to users.

- To limit access to top-level functionality, restrict the number of users assigned to Administrator and Commerce Administrator permission sets.
- Users assigned to Commerce Administrator and Administrator require no other permission sets.
- Buyer, Buyer Manager, and Shopper permission sets allow external users to view and purchase products on your storefront. You can set up guest browsing during store configuration so that external users can view and purchase products without registering.
- Follow task-based assignments for your internal users, including Merchandisers and Administrators. Use the permission set descriptions to match users with the personas that meet their required capabilities.

SEE ALSO:

[Permission Sets](#)

[View Permission Set Overviews](#)

[Preconfigured Permission Sets for B2B and D2C Commerce](#)

[Personas and Permissions](#)

View Permission Set Overviews

The permission set overview page gives detailed information about permission set functionality. From there, view settings such as Object Settings, Flow Access, and System Permissions.

1. From Setup, in the Quick Find box, enter *Permission Sets*, and then select **Permission Sets**.
2. Select the permission set that you want.

SEE ALSO:

[Permission Sets](#)

[Preconfigured Permission Sets for B2B and D2C Commerce](#)

[Guidelines for Assigning Permission Sets](#)

[Personas and Permissions](#)

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

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Available in: B2B Commerce and D2C Commerce

Preconfigured Permission Sets for B2B and D2C Commerce

Users assigned to preconfigured permission sets receive permissions according to their persona's required functionality. You can customize these permission sets by cloning them and modifying individual permissions.

Not all permissions in preconfigured permission sets are required to complete all tasks for the related persona. If you create custom permission sets, use the permission descriptions to match users with the permissions that meet their required capabilities.

This table shows the permissions defined by each preconfigured permission set for B2B and D2C Commerce.

Table 4: Key

✓	Enabled by the preconfigured permission set.
✗	Disabled by the preconfigured permission set.
N/A	Not included in the permission set, and can't be added to a cloned permission set.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

System Permission	Description	Buyer (B2B stores only)	Buyer Manager (B2B stores only)	Shopper (B2C stores only)	Merchandiser	Commerce Admin
Access Drag-And-Drop Content Builder	Create and manage email templates and content in a drag-and-drop builder.	N/A	N/A	N/A	✓	✓
B2B Commerce Integrator	Process integrations and export and import orders from external order management systems.	N/A	N/A	N/A	N/A	✗
B2B Commerce Super User	Access all the carts and orders related to their account, regardless of who the carts and orders owners are.	N/A	✓	N/A	N/A	N/A
D2C Commerce User	Access the B2C checkout.	N/A	N/A	✓	N/A	N/A

System Permission	Description	Buyer (B2B stores only)	Buyer Manager (B2B stores only)	Shopper (B2C stores only)	Merchandiser	Commerce Admin
Commerce Entitlements Integrator	Receive Modify All permissions for Buyer Group, Buyer Group Member, Entitlement Buyer Group, Entitlement Policy, and Entitlement Product objects to integrate entitlement data from a third-party system.	N/A	N/A	N/A	N/A	✘
Commerce Shipment Integrator	Access shipment information. A user's access to order summaries controls the user's access to shipments.	N/A	N/A	N/A	✔	✔
Commerce User	Access the store.	✔	✔	✔	N/A	N/A
Create and Customize Reports	Create, edit, and delete reports in personal folders.	N/A	✔	N/A	✘	✔
Create and Set Up Experiences	Create Experience Cloud sites, manage settings, membership, login and registration, branding, and associated Site.com site.	N/A	N/A	N/A	✔	✔
Create CMS Workspaces and Channels	Create Workspaces and Channels in Salesforce CMS.	N/A	N/A	N/A	✔	✔
Create Report Folders	Create report folders and	N/A	✔	N/A	✘	✔

System Permission	Description	Buyer (B2B stores only)	Buyer Manager (B2B stores only)	Shopper (B2C stores only)	Merchandiser	Commerce Admin
	manage these folders if sharing rights allow.					
Customize Application	Customize the organization using App Setup menu options.	N/A	N/A	N/A	✘	✔
Lightning Console User	Access Lightning console apps.	N/A	N/A	N/A	✔	✔
Lightning Experience User	Access Lightning Experience and switch between Lightning Experience and Salesforce Classic.	N/A	N/A	N/A	✔	✔
Manage Account Addresses	Create, update, and delete contact point addresses on accounts. ¹	N/A	N/A	✔	N/A	N/A
Manage Custom Permissions	Create, edit, and delete custom permissions.	N/A	N/A	N/A	✘	✔
Manage Stores	Manage store settings.	N/A	N/A	N/A	✔	✔
Manage Translation	Manage translated labels in the Translation Workbench.	N/A	N/A	N/A	✘	✔
Payments API User	Access CCS Payment APIs.	✔	✔	✔	✔	✔
Run Flows	Run any active flow. In Experience Builder sites, run any active flow	N/A	N/A	✔	N/A	N/A

¹ You can create up to 2,000 contact point address records. Additional records are dropped.

If buyers or buyer managers want to create, edit, and delete addresses, enable the Manage Account Addresses system permission within the permission set.

System Permission	Description	Buyer (B2B stores only)	Buyer Manager (B2B stores only)	Shopper (B2C stores only)	Merchandiser	Commerce Admin
	that's distributed with the Flow Lightning component.					
Run Reports	Run reports and dashboards.	N/A	N/A	N/A	✓	✓
View Roles and Role Hierarchy	View roles and role hierarchy.	N/A	N/A	N/A	✓	✓
View Setup and Configuration	View the App Setup and Administrative Settings pages.	N/A	N/A	N/A	✓	✓

SEE ALSO:

[Permission Sets](#)

[View Permission Set Overviews](#)

[Guidelines for Assigning Permission Sets](#)

[Personas and Permissions](#)

B2B and D2C Commerce Integrator Permissions

Salesforce provides several system permissions that enable users to integrate their B2B and B2C stores with third-party applications.

The B2B Commerce Integrator and Commerce Entitlements Integrator permissions are disabled by default for all users. A Salesforce admin can enable these permissions for specific users by cloning the Commerce Admin permission set and then modifying it.

System Permission	Description	Included in These Permission Sets
B2B Commerce Integrator	Process integrations and export and import orders from external order management systems.	<ul style="list-style-type: none"> Commerce Admin (disabled by default)
Commerce Entitlements Integrator	Receive "Modify All" permissions for Buyer Group, Buyer Group Member, Entitlement Buyer Group, Entitlement Policy, and Entitlement Product objects to	<ul style="list-style-type: none"> Commerce Admin (disabled by default)

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

System Permission	Description	Included in These Permission Sets
	integrate entitlement data from a third-party system.	
Commerce Shipment Integrator	Access shipment information. A user's access to order summaries controls the user's access to shipments.	<ul style="list-style-type: none"> Merchandiser (enabled by default) Commerce Admin (enabled by default)

SEE ALSO:

[B2B and D2C Commerce Permission Sets](#)

[Preconfigured Permission Sets for B2B and D2C Commerce](#)

Default Object CRUD Permissions for B2B and D2C Commerce

You can perform Create, Read, Update, and Delete (CRUD) operations on objects in your org depending on your permissions. Users assigned to preconfigured permission sets receive CRUD permissions according to their persona's required functionality.

You can customize permission sets by cloning them and modifying the object settings. However, the CRUD permissions that are editable in a cloned permission set can differ from the permissions granted in the preconfigured permission set. In such cases, this table lists both the default and editable CRUD permissions.

Entity	Buyer (B2B stores only)	Buyer Manager (B2B stores only)	Shopper (B2C stores only)	Merchandiser	Commerce Admin
Account	R	R	R	CRUD	CRUD
BackgroundOperation	—	R	R	<ul style="list-style-type: none"> Default: — Editable: R 	<ul style="list-style-type: none"> Default: — Editable: R
BuyerAccount	R	R	—	CRUD	CRUD
BuyerGroup	—	—	—	CRUD	CRUD
BuyerGroupPricebook	—	—	—	CRUD	CRUD
CardPaymentMethod	—	R	—	R	R
CommerceEntitlementPolicy	—	—	—	CRUD	CRUD
ConsumptionSchedule	R	R	—	—	—
Contact	RU	CRUD	RU	CRUD	CRUD
ContactPointAddress	CRUD	CRUD	CRUD	CRUD	CRUD
Coupon	—	—	—	CRUD	CRUD

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

Entity	Buyer (B2B stores only)	Buyer Manager (B2B stores only)	Shopper (B2C stores only)	Merchandiser	Commerce Admin
ElectronicMediaGroup	R	R	R	CRUD	CRUD
Image	R	R	R	—	—
Individual	R	R	R	R	R
Location	R	R	R	CRUD	CRUD
Order	CRUD	CRUD	R	R	R
OrderDeliveryMethod	R	R	R	CRUD	CRUD
OrderSummary	R	R	R	R	R
PaymentAuthorization	—	R	—	R	R
PaymentGateway	—	—	—	CRUD	CRUD
PaymentGatewayLog	—	—	—	R	R
PaymentGroup	—	—	—	R	R
PriceAdjustmentSchedule	—	—	—	CRUD	CRUD
Pricebook2 (Label: Price Books)	R	R	R	CRUD	CRUD
Product2 (Label: Products)	R	R	R	CRUD	CRUD
ProductCatalog (Label: Catalogs)	R	R	R	CRUD	CRUD
ProductCategory (Label: Categories)	R	R	R	CRUD	CRUD
ProductCategoryProduct	R	R	R	CRUD	CRUD
Promotion	—	—	—	CRUD	CRUD
PromotionMarketSegment	—	—	—	CRUD	CRUD
PromotionQualifier	—	—	—	CRUD	CRUD
PromotionSegment	—	—	—	CRUD	CRUD
PromotionTarget	—	—	—	CRUD	CRUD
PromotionTier	—	—	—	CRUD	CRUD
UserExternalCredential	—	—	CRUD	<ul style="list-style-type: none"> • Default: — • Editable: CRUD 	<ul style="list-style-type: none"> • Default: — • Editable: CRUD
WebCart (Label: Carts)	CRUD	CRUD	R	R	R
WebStore (Label: Stores)	R	R	R	RU	CRUD

Entity	Buyer (B2B stores only)	Buyer Manager (B2B stores only)	Shopper (B2C stores only)	Merchandiser	Commerce Admin
WebStoreBuyerGroup (Label: Store Buyer Groups)	—	—	—	CRUD	CRUD
WebStoreCatalog (Label: Store Catalogs)	R	R	R	CRUD	CRUD
WebStorePricebook (Label: Store Pricebooks)	—	—	—	CRUD	CRUD
Wishlist	CRUD	CRUD	CRUD	CRUD	CRUD

SEE ALSO:

[B2B and D2C Commerce Permission Sets](#)

[Preconfigured Permission Sets for B2B and D2C Commerce](#)

Order Management and Omnichannel Inventory

You can use Salesforce Order Management and Salesforce Omnichannel Inventory with B2B Commerce and D2C Commerce. Order Management helps you manage your orders throughout the order lifecycle, from creation to fulfillment to servicing. Omnichannel Inventory delivers real-time inventory availability data, helping you avoid costly undersells and oversells.

You must purchase an Order Management license to use B2B Commerce with Order Management. D2C Commerce comes with only a limited set of Order Management functionality. To use the full functionality of Order Management with D2C Commerce, you must purchase an Order Management license.

 **Note:** B2B Commerce and D2C Commerce can place orders containing more than 200 line items. Order Management, however, doesn't support routing, capturing payments, and creating invoices for orders that contain over 200 line items.

For information about implementing Order Management, see [Salesforce Order Management Implementation Guide for B2B and D2C Commerce](#).

For information about using Order Management, see [Salesforce Order Management Help](#).

For information about implementing Omnichannel Inventory, see [Salesforce Omnichannel Inventory Implementation Guide](#) and [Using Salesforce Omnichannel Inventory with Commerce Stores](#).

For information about using Omnichannel Inventory, see [Omnichannel Inventory Help](#).

SEE ALSO:

[Using Salesforce Omnichannel Inventory with Commerce Stores](#)

EDITIONS

Available in: Lightning Experience and mobile devices

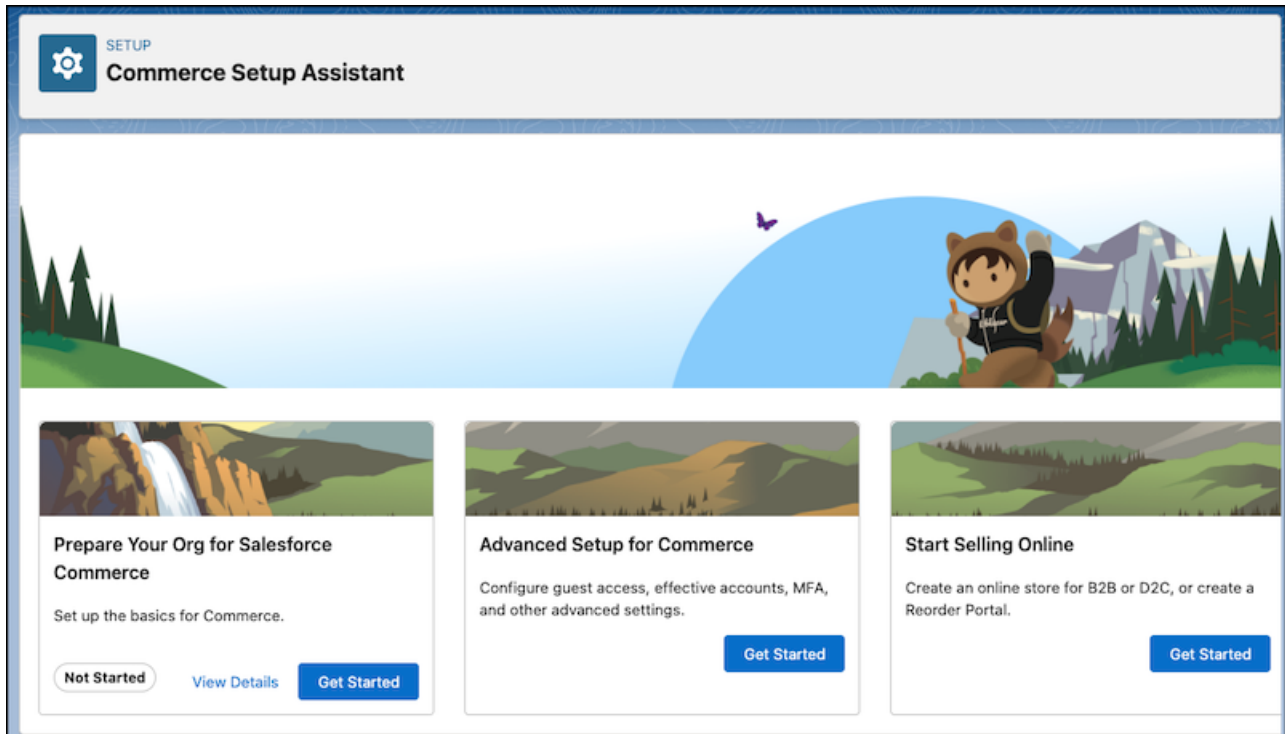
Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

Prepare Your Org for Commerce

Use the Commerce Setup Assistant to automatically configure org preferences, sharing settings, object layouts, and other settings that optimize and enable your org for Commerce.

To access the Commerce Setup Assistant, from Setup, in the Quick Find box, enter *Commerce Setup Assistant*. From the **Prepare Your Org for Salesforce Commerce** tile, click **Get Started** or **View Details** for more information.



[Permission Sets for Buyers, Buyer Managers, and Account Switchers for B2B Stores](#)

Salesforce provides preconfigured permission sets for buyers and buyer managers. The preconfigured buyer permission set allows access to the store. Buyer users can see products and categories and add products to wishlists. The preconfigured buyer manager permission set includes all buyer capabilities, and also allows access to manage carts and orders related to the buyer manager's account. Buyer manager users can manage contacts and reports.

[Create a Shopper Profile and Permission Set Group](#)

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 Internal Users for Commerce](#)

Several internal users are involved in creating stores. Commerce admins perform commerce administration tasks, and merchandisers design and manage the storefront, import products, and configure search. Create a profile for these internal users, and then use the profile to create the users, assigning the appropriate permission set for each type of user.

[Configure Sharing Settings for Commerce](#)

Configure default sharing settings for commerce objects.

[Add Related Lists to the Price Book Entry Page for Commerce](#)

To optimize the Commerce experience, customize the Price Book Entry page to add Active Price Adjustment and Product Selling Model related lists.

[Enable Person Accounts for Commerce](#)

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.

[Enable State and Country Picklists](#)

Stores based on the LWR (Lightning Web Runtime) template accept only two-digit ISO codes for country and state or province. To minimize user entry errors, we recommend enabling state and country picklists, so that users select values from a list instead of typing them in. The picklists ensure that two-digit ISO codes are used consistently throughout the entire organization.


[Customize the Commerce App](#)

Quick links in the Commerce app direct merchandisers and commerce admins to pages where they can create a store, install reports, manage data, and enhance products. They can use the navigation menu to move between stores, products, price books, entitlements, buyer groups, and more. To optimize the app for your commerce admins and merchandisers, you can add objects and tabs.

Permission Sets for Buyers, Buyer Managers, and Account Switchers for B2B Stores


Salesforce provides preconfigured permission sets for buyers and buyer managers. The preconfigured buyer permission set allows access to the store. Buyer users can see products and categories and add products to wishlists. The preconfigured buyer manager permission set includes all buyer capabilities, and also allows access to manage carts and orders related to the buyer manager's account. Buyer manager users can manage contacts and reports.

You can optionally create an account switcher permission set that allows buyers or buyer managers to switch between accounts. To create an account switcher permission set, clone the buyer or buyer manager permission set and add System Permissions.

 **Note:** Users assigned to an account switcher permission set based on the buyer manager permission set can create, edit, and delete addresses on accounts they have access to. Users assigned to an account switcher permission set based on the buyer permission set have only read access to addresses on the other accounts.

Buyer users require a Customer Community license or a license with a higher level of privileges. Buyer managers and account switchers require a Customer Community Plus license or a license with a higher level of privileges.

If you don't want to use the preconfigured buyer and buyer manager permission sets, we recommend that you clone the preconfigured sets and customize as necessary.

 **Important:** Salesforce recommends that you set the Default External Access sharing setting in Organization-Wide Defaults to Private on Product records for all commerce use cases. If the Default External Access sharing setting isn't set to Private, and you have multiple stores or both stores and other Experience Cloud sites, it's possible for authenticated users to use a SOQL query and discover all your products regardless of any entitlements you've set up. However, they can't see prices nor purchase products. For the most secure setup for external users, don't grant access to products and other commerce objects at the profile level. Instead, grant access to objects through a permission set that is only assigned to buyers and buyer managers.

SEE ALSO:

[Manage Buyer Access to B2B Stores](#)

Create a Shopper Profile and Permission Set Group

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**.

SEE ALSO:

[Profiles](#)[Permission Set Groups](#)

Configure Internal Users for Commerce


Several internal users are involved in creating stores. Commerce admins perform commerce administration tasks, and merchandisers design and manage the storefront, import products, and configure search. Create a profile for these internal users, and then use the profile to create the users, assigning the appropriate permission set for each type of user.


1. Clone the Identity User profile.
 - a. From Setup, in the Quick Find box, enter *Profiles*. Next to Identity User Profile, select **Clone**.
 - b. For Profile Name, enter *Commerce Business User Profile*.
You can choose another name, but keep in mind that this profile is used for your internal users.
 - c. Click **Save**.
2. Configure the profile that you created.
 - a. On the Profiles page, click **Edit** next to the profile you created.
 - b. In the Custom App Settings section, for the Commerce app and in the Digital Experiences app, select **Visible**.
 - c. In the Tab Settings section, change these items to **Default On**.
 - Accounts
 - Buyer Groups
 - Catalogs
 - Categories
 - CMS Channels
 - CMS Workspaces

- Commerce Setup
- Customer Workspace
- Entitlement Policies
- Guest Buyer Profile
- Order Delivery Methods
- Orders
- Order Summaries
- Price Adjustment Schedules
- Price Books
- Pricing Workspace
- Promotion Workspace
- Products
- Product Workspace
- Store Price Books
- Stores

d. Click **Save**.

Use the Commerce Business User Profile when creating internal users. When creating a commerce admin user, assign the Commerce Admin permission set. When creating a merchandiser user, assign the Merchandiser permission set.

 **Note:** Both the Commerce Admin permission set and the Merchandiser permission set allow access to buyer groups. Users who have access to buyer groups also have read access to all related buyer group members.

 **Important:** To allow self-registration on stores to work correctly, make sure all internal users who create stores are assigned to a role.

 **Note:** To specify which internal users can access which stores, contact your account executive.

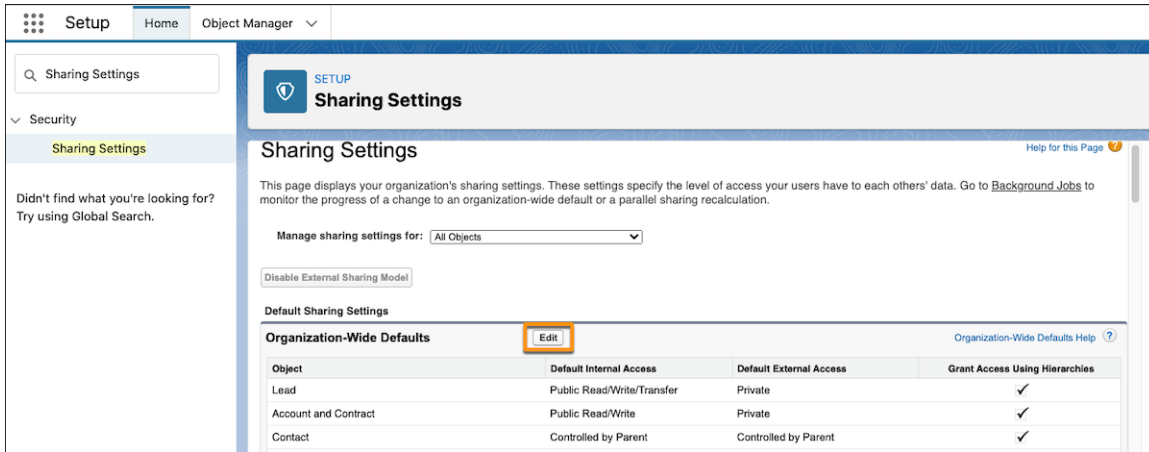
SEE ALSO:

[Profiles](#)



Configure Sharing Settings for Commerce

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**.



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  Note: 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  Note: 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**.

SEE ALSO:

[Sharing Settings](#)

Add Related Lists to the Price Book Entry Page for Commerce

To optimize the Commerce experience, customize the Price Book Entry page to add Active Price Adjustment and Product Selling Model related lists.


1. From the Object Manager, enter *Price Book Entry* in the Quick Find box.
2. Select **Price Book Entry** > **Page Layouts** > **Price Book Entry**.
3. In Layout Properties, select **Related Lists**.
4. Drag **Active Price Adjustment** and **Product Selling Model** to the **Related Lists** section at the bottom of the page.
5. Click **Save As**, and save the layout as *Commerce Price Book Entry*.


SEE ALSO:

[Page Layouts](#)

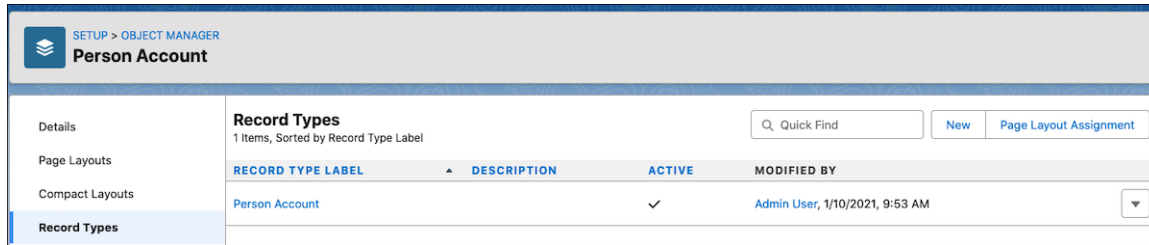
Enable Person Accounts for Commerce

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.

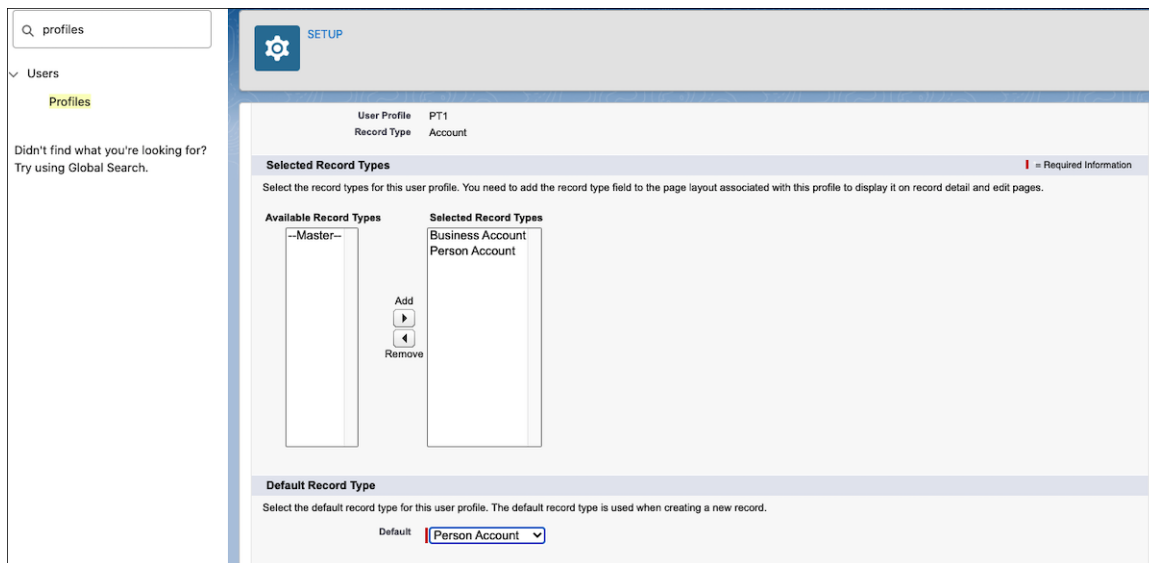


If you don't see the Person Account record type, contact Salesforce Support.

4. Configure the System Administrator profile.

The System Administrator profile requires access to the Business Account record type and the Person Account record type.

- 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**.

SEE ALSO:

[Person Accounts](#)

Enable State and Country Picklists

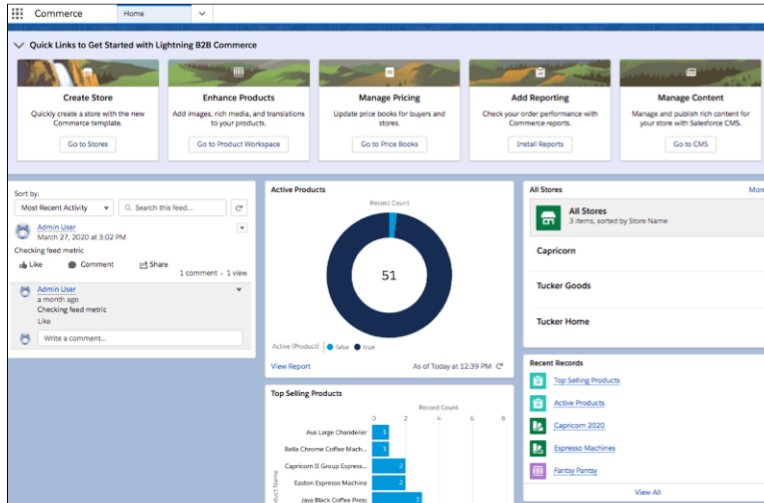
Stores based on the LWR (Lightning Web Runtime) template accept only two-digit ISO codes for country and state or province. To minimize user entry errors, we recommend enabling state and country picklists, so that users select values from a list instead of typing them in. The picklists ensure that two-digit ISO codes are used consistently throughout the entire organization.

For information about enabling state and Country picklists, see [Enable and Disable State and Country/Territory Picklists](#).

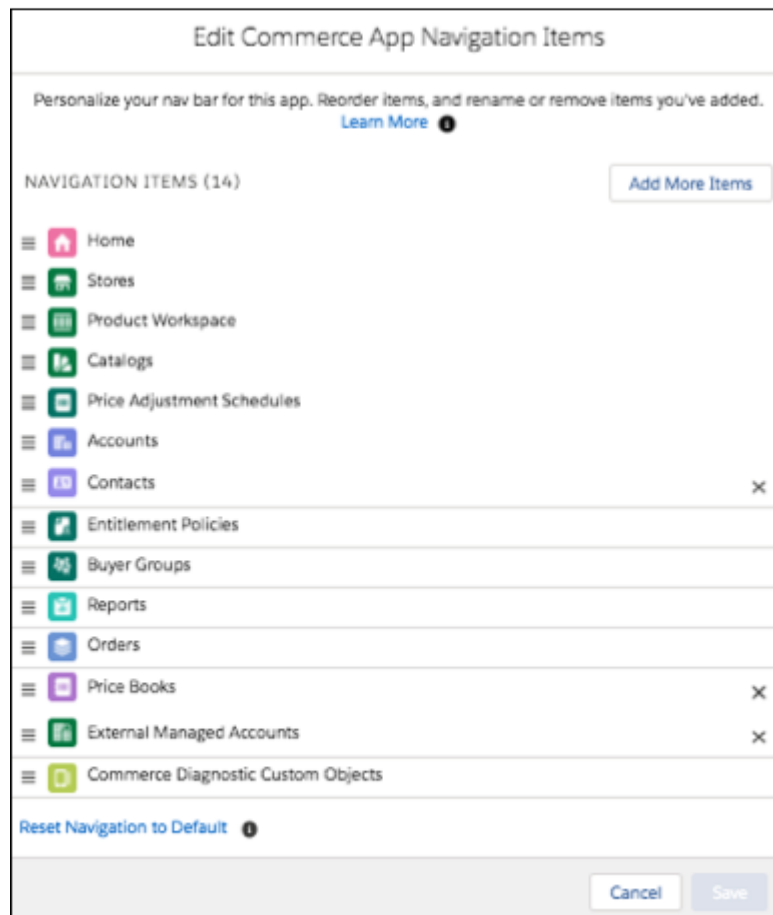
Customize the Commerce App

Quick links in the Commerce app direct merchandisers and commerce admins to pages where they can create a store, install reports, manage data, and enhance products. They can use the navigation menu to move between stores, products, price books, entitlements, buyer groups, and more. To optimize the app for your commerce admins and merchandisers, you can add objects and tabs.

1. Go to the app launcher, and select **Commerce**.



2. Add more objects to the Commerce App navigation menu.
 - a. Click the dropdown arrow, and select **Edit**.
 - b. Click **Add More Items** and add any objects that your merchandisers and commerce admins manage that aren't already included on the list.



- c. Save your changes.
3. Set additional tabs to be on by default.

We recommend that you set the Commerce Setup and Price Book tabs to be on by default.

 - a. Go to **Setup > Home > Users > Profiles**.
 - b. Select the System Administrator profile, and click **Edit**.
 - c. Set tabs, for example Commerce Setup and Price Book to **default on**.
 - d. Save your changes.

SEE ALSO:

[Lightning App Builder](#)

B2B and B2C Store Creation

The store is where shoppers and buyers go to view, select, and purchase your products. We provide B2B and B2C store templates to get you started. If you have an existing experience cloud site, you can add a B2B store to that site. You can add also sample data to a new B2B store to help you get started.

[Create a Store or Reorder Portal](#)

Quickly set up a fully functioning B2B or B2C store, or create a reorder portal to embed into your sales or service cycles.

[Create a B2B or B2C Store on an Existing Experience Cloud Site](#)

You can add a B2B or B2C store to a site that you already have. Reuse the site's domain and settings, branding, and styling to present an integrated experience to your users. The site template, pages, components, and navigation stay the same, but after you add the store, you can use commerce pages and components to design your commerce experience.

[Commerce Reorder Portal](#)

Use a Commerce reorder portal to simplify repeat orders. Configure a cadence or an Einstein Next Best Action component to invite a buyer to the portal.

[Migrate a Nonenhanced LWR Commerce Store to a New Salesforce Org](#)

Starting in Winter '24, all new stores are built on enhanced LWR sites. If you have a store built on a nonenhanced LWR site, you can migrate that store to production or to another org.

Create a Store or Reorder Portal

Quickly set up a fully functioning B2B or B2C store, or create a reorder portal to embed into your sales or service cycles.

This task assumes that your org is already set up for Commerce. If it's not, from Setup, in the Quick Find Box, enter *Commerce*, and select **Commerce Setup Assistant**. Click the **Prepare Your Org for Commerce** tile and follow the prompts on the screen.

New stores and reorder portals are built on enhanced LWR sites. See [What is the Enhanced Sites and Content Platform](#).

1. From the Commerce Setup Assistant, click **Start Selling Online**

You can also select **Stores** from the Commerce app navigation menu, and then click **Create a Store**.

2. Choose a selling channel template.

After you use a template to create a selling channel, you can't change the template.

3. Click **Next**.

4. Select a **Default Ship to Country**.

The list of available countries is configured in Setup, at **Data > State and Country/Territory Picklists > Configure States, Countries, and Territories**.

5. Select a **Default Language**.

The available languages are the languages enabled in Translation Workbench. See [Enable Translation Workbench](#).

When we create the store, we set the default language that you select here as the default language in Experience Builder. If you change the default language later, you must manually change the default language in Experience Builder. See [Configure Language, Ship-To Countries, and Currencies for a B2B Store](#) and [Configure Language, Ship-To Countries, and Currencies for a B2C Store](#).

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

6. Select a Default Currency.

The available currencies are the currencies enabled in your org. See [Enable Currencies](#).

7. Enter a name for your selling channel.

Don't include an apostrophe in the name. If you're creating more than one selling channel, differentiate the beginning of each name by business unit, region, or other distinction. Users can see up to 32 characters of the name in the global header dropdown menu.

8. Enter the URL for a unique path to the store or reorder portal.

The URL is the default domain for digital experiences in your Salesforce org, plus the path that you enter in this field. For example, your default domain is *MyDomainName.my.site.com*, and you enter *jewelry* in the URL field. The initial URL is *MyDomainName.my.site.com/jewelry*. Before you can activate the selling channel, you must change the URL to use a custom domain.

9. To automatically import all recent products for use in a reorder portal, select **Add all simple products sold in the last 365 days.**

Only simple products are imported. For information about simple products, see [Product Classes, Variations, and Attributes](#).

10. Click **Start Selling.**

A selling channel based on the template that you selected is created, including a site that you can access through Experience Builder. The selling channel is created with these default entities.

- A store catalog with one product category
- A store buyer group with an entitlement policy
- A store price book and store strikethrough price book
- An enhanced CMS workspace and a public channel that connects the store to that CMS workspace

You can create and assign different records to the selling channel, but you can't delete the default entities, except for the product category. You can change the CMS public channel for the store. See [Assign a CMS Public Channel to a Commerce Store](#). When you use a CSV file to import data, the data is assigned to the default records.

If the creation process encounters an error, the selling channel is created without a catalog, buyer group, and price books. In this case, you must create these entities.

From the home page for the new store, click **Set up store**. To get information and links to help you get your store ready, click each task in the list.

SEE ALSO:

[Store Customization](#)

[B2B Commerce Aura to LWR Migration Guide](#)

[Create a Catalog and Assign It to a Store](#)

[Manage Buyer Access to B2B Stores](#)

[Create a Buyer Group or Store Price Book](#)

[Create a CMS Workspace to Import Images to a Commerce Store](#)

[Use a Custom URL for Your Store](#)

[Create a B2B or B2C Store on an Existing Experience Cloud Site](#)

[Default Entities for Import to Stores](#)

[LWR and Aura Store Templates](#)

Create a B2B or B2C Store on an Existing Experience Cloud Site

You can add a B2B or B2C store to a site that you already have. Reuse the site's domain and settings, branding, and styling to present an integrated experience to your users. The site template, pages, components, and navigation stay the same, but after you add the store, you can use commerce pages and components to design your commerce experience.

You can add Commerce stores based on the following templates to an existing site.

B2B	D2C
B2B (Aura)	B2C (LWR)
B2B (Aura)	Pay Now (LWR)
B2B Reorder Portal (LWR)	
CPT (Aura)	
Starter (Aura)	
Pay Now (LWR)	

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

1. In the App launcher, select **Commerce**.
2. From the Commerce app navigation menu, select **Stores**.
3. Click **Create a Store on Existing Site**.
4. Choose to create a B2B or B2C store.
Your options depend on which licenses you have.
5. Enter a name for your store, and click **Next**.
When naming your store:
 - Don't include an apostrophe character in the store name.
 - If you're creating more than one store, differentiate the beginning of each store name by business unit, region, and so on.
 - Keep it short. Names are truncated in the global header dropdown menu. Users can see up to 32 characters.
6. Select the site where you want to create the store.
If a site already has a store, it's not included in the list.
7. Click **Create Store**.
When you add a store to an existing site, the store defaults for buyer group, catalog, category, price book, and entitlement policy aren't created for you.
8. From the new store's home page, click the **Experience Builder** tile.
9. (Optional) Add the standard commerce pages that you want to use in your storefront.
 - a. From the Pages dropdown menu, select **New Page > Standard Page**.
 - b. Click the page to add, for example, **Checkout**, and then click **Next**.
 - c. Enter a name and API name for the page.
 - d. Click **Create**.

- e. Repeat these steps for other standard pages that you want to use, for example, Commerce Storefront, My Lists, Order Confirmation, and Quick Order.
10. (Optional) Add the Cart object page.
 - a. From the Pages dropdown menu, select **New Page > Object Pages**.
 - b. Click **Cart**, and then click **Create**.
 - c. In the message about the new object pages, click **Create**.
 - d. From the Pages dropdown, select **Cart Detail**.
 - e. Optionally, delete the generic components on the page and add the Cart, Cart Totals, and Checkout button components.
11. (Optional) Add the Category object page.
 - a. From the Pages dropdown menu, select **New Page > Object Pages**.
 - b. Click **Category**, and then click **Create**.
 - c. In the message about the new object pages, click **Create**.
 - d. From the Pages dropdown, select **Category Detail**.
 - e. Optionally, delete the generic components from the page and add the Results Layout component.
12. (Optional) Add the Product object page.
 - a. From the Pages dropdown menu, select **New Page > Object Pages**.
 - b. Click **Product**, and then click **Create**.
 - c. In the message about the new object pages, click **Create**.
 - d. From the Pages dropdown, select **Product Detail**.
 - e. Optionally, delete the generic components from the page and add the Product Detail Card and Product Attachment components.
13. (Optional) Set up the store to use categories as the default navigation.
 - a. Click the gear icon and select **Settings > Navigation**.
 - b. From the Default Navigation dropdown, select **Edit**.
 - c. Click **Add Menu Item**.
 - d. From the Type dropdown, select **Data Source**.
 - e. From the Data Source dropdown, select **Storefront Categories**.
 - f. Select **Publicly available**.
14. For B2C stores, to associate the site with the store, republish the site.

SEE ALSO:

[Create a Store or Reorder Portal](#)

Commerce Reorder Portal

Use a Commerce reorder portal to simplify repeat orders. Configure a cadence or an Einstein Next Best Action component to invite a buyer to the portal.

[Sell with a Commerce Reorder Portal](#)

Provide buyers with a streamlined reorder experience using a Commerce reorder portal using this high-level sequence of steps.

[Sharing Settings for a Commerce Reorder Portal](#)

When a rep invites a contact to a reorder portal, the action creates order summary records for the context order and the past year of order records associated with the contact. Make sure that both the sales rep and reorder portal buyer have read access to these order summary records.

[Configure an Einstein Next Best Action Component for a Commerce Reorder Portal](#)

After you set up a Commerce Reorder Portal, configure an Einstein Next Best Action component on the Order record page. Based on a recommendation from this component, a rep can invite a buyer to the portal.

Sell with a Commerce Reorder Portal

Provide buyers with a streamlined reorder experience using a Commerce reorder portal using this high-level sequence of steps.

Important: In Summer '23, fill out the [permission request form](#) to turn on the required permission for a Commerce reorder portal. In Winter '24 and later versions, the permission is turned on by default.

1. Creating a Commerce reorder portal is similar to creating a B2B Commerce store. To get started, use the Commerce Setup Assistant to quickly build your fully functioning reorder portal. See [Create a Store or Reorder Portal](#).
2. From the store creation flow, select the Commerce Reorder Portal template. This template provides a preconfigured subset of Commerce LWR components. For example, the Home page uses the Order List component to display the customer's recent orders.

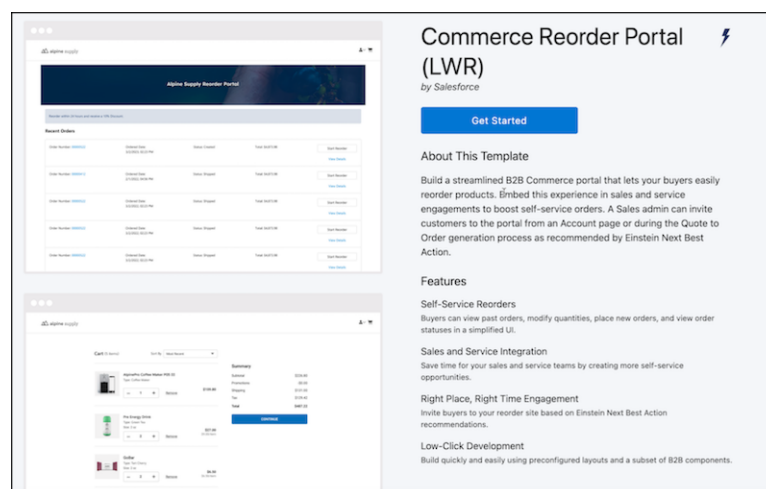
During the creation of the reorder portal, you can select **Add all simple products sold in the last 365 days** to import products for use in the reorder portal. Only simple products are imported. For information about simple products, see [Product Classes, Variations, and Attributes](#).

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions with Sales Cloud

Available in: B2B Commerce



3. From the Commerce Setup Assistant, click **Brand My Site** and follow the prompts to add your company logo, fonts, and colors to the reorder portal. To further customize the portal's branding, see [Store Customization](#).
4. To configure checkout functionality in the reorder portal, add payment, shipping, and tax calculation services. Other checkout services are optional. See [Commerce Checkout](#).

5. Create a catalog and set up your products and pricing. See [Products and Pricing](#).
6. Make sure your sharing settings give read access to order summary records for sales reps and reorder portal buyers. See [Sharing Settings for a Commerce Reorder Portal](#).
7. To add customers to the reorder portal, configure the Invite Contact to Reorder Portal cadence in Sales Engagement. You can also send invitations from the Order Record page by configuring an Einstein Next Best Action component.

SEE ALSO:

[Configure an Einstein Next Best Action Component for a Commerce Reorder Portal](#)

[Use Cadences for a Commerce Reorder Portal](#)

Sharing Settings for a Commerce Reorder Portal

When a rep invites a contact to a reorder portal, the action creates order summary records for the context order and the past year of order records associated with the contact. Make sure that both the sales rep and reorder portal buyer have read access to these order summary records.

By default, the Commerce Reorder Portal Inviter license provides read access to order summaries. However, certain licensing and CRUD permission configurations require additional setup.

Reorder Portal Buyer

The default sharing settings for a reorder portal buyer depend on the buyer's license type and the external sharing settings for order summaries.

- If the buyer has a Customer Community Plus license, they receive read access to order summary records, and no action is needed.
- If the buyer doesn't have a Customer Community Plus license and external sharing settings for order summaries are private, create a sharing set using the B2B Reordering Portal Buyer Profile and OrderSummary entity. See [Create a Sharing Set](#). When defining sharing criteria, provide Read Only access if `User.Contact equals OrderSummary.OriginalOrder.CustomerAuthorizedBy`.
- If the buyer doesn't have a Customer Community Plus license, external sharing settings for order summaries are Controlled by Parent, and external sharing settings for orders are private, create a sharing set. Use the B2B Reordering Portal Buyer Profile and Order entity. When defining sharing criteria, provide Read Only access if `User.Contact equals Order.CustomerAuthorizedBy`, `Order.Contract.CustomerSigned`, or `Order.Quote.Contact`.

 **Important:** Make sure that any field you map to `User.Contact` in the sharing set gets populated in your org's order records.

Sales Rep

The default sharing settings for a sales rep depend on the rep's access to orders and the internal sharing settings for order summaries.

- If the rep owns the context order, they receive read access to the order summary records, and no action is needed.
- If the rep doesn't own the context order and internal sharing settings for order summaries are private, grant them read access to order summaries. Use Sharing Settings, Sharing Rules, or Manual Shares.
- If the rep doesn't own the context order, internal sharing settings for order summaries are Controlled by Parent, and internal sharing settings for orders are private, grant them read access to orders. Use Sharing Settings, Sharing Rules, or Manual Shares.

SEE ALSO:

[B2B Commerce Licenses and Allocations](#)

EDITIONS


Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions with Sales Cloud

Available in: B2B Commerce

Configure an Einstein Next Best Action Component for a Commerce Reorder Portal

After you set up a Commerce Reorder Portal, configure an Einstein Next Best Action component on the Order record page. Based on a recommendation from this component, a rep can invite a buyer to the portal.

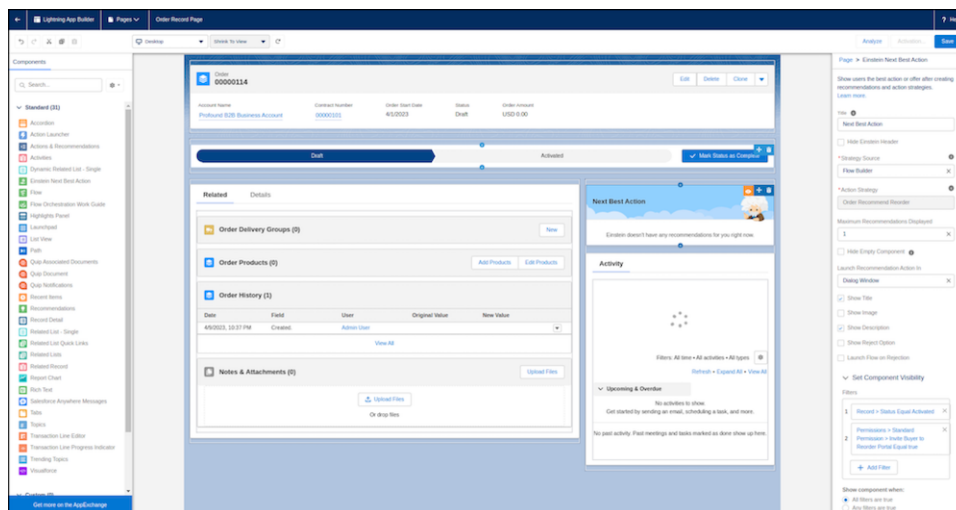
1. Add the [Einstein Next Best Action component](#) to the Order record page.
 - a. Open an Order record.
 - b. Click the Setup icon .
 - c. Click **Edit Page**.
 - d. From the Components menu, drag the Einstein Next Best Action component onto the Order Record Page layout in the Activity sidebar.
 - e. Use the Order Recommend Reorder flow as Action Strategy input for the component.
 - f. Click **Save**.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions with Sales Cloud

Available in: B2B Commerce



2. Enable any missing Field Level Security settings for Order.Quoteld, Order.ContractId, Order.CustomerAuthorizedBy, Quote.ContactId, and Contract.CustomerSignedId. See [Field Level Security](#).
3. Set External and Internal Organization-Wide Sharing Defaults to private for the Order Summary object.
4. Invite a buyer to a Commerce Reorder Portal using the Einstein Next Best Action component.
 - a. Open an Order record.
 - b. From the Einstein Next Best Action component, click **Invite to Reorder Portal**.
 - c. Follow the screen flow steps.

SEE ALSO:

[Sell with a Commerce Reorder Portal](#)

Migrate a Nonenhanced LWR Commerce Store to a New Salesforce Org

Starting in Winter '24, all new stores are built on enhanced LWR sites. If you have a store built on a nonenhanced LWR site, you can migrate that store to production or to another org.

1. Deploy a nonenhanced site using MetaData API.
See [Deploy Your Experience Cloud Site with the Metadata API](#).
2. Create a store on the new site.
See [Create a B2B or B2C Store on an Existing Experience Cloud Site](#).
3. To delete the webstore-to-CMS connection for the new store, contact Salesforce Customer Support.
Deleting this connection allows you to import media from a non-enhanced CMS workspace.
4. Create a nonenhanced CMS workspace using the Digital Experiences app.
See [Create a CMS Workspace](#). When you create the workspace, select **CMS Workspace**, not **Enhanced CMS Workspace**.
5. Rebuild your store.
When you import to the new store, select the nonenhanced CMS workspace that you created.

EDITIONS

Available in: Lightning Experience


Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Import and Export Commerce Data

Import data, including products, product variations, and images, by uploading a CSV file. Data import occurs asynchronously, so after you start an import, you can perform other tasks. You can import data for a particular store or globally so that any store can access it. We recommend using the CSV file import process, but for large imports, use Data Loader. You can also export data for up to 300,000 products to a CSV file.

You can import up to 10,000 products with nine images each in an import session. Import times increase in relation to the number or images included.

 **Tip:** For faster performance when importing to a Commerce site that uses nonenhanced CMS workspaces, we recommend importing images in a separate CSV file. First import a file that contains only product information and related entities. Then import a separate file that includes only the product IDs and images.

You can run one only Commerce import job, including category or product imports, at a time. If a Commerce import job is running, wait for it to complete or cancel it before starting a new import.

Using CPQ (Configure, Price, Quote) triggers isn't compatible with a CSV import.

[Image Import for Commerce Stores](#)

Product images and attachments that customers see when visiting your store are typically linked to a Salesforce CMS workspace. Usually the images are stored on a host external to Salesforce. You configure the external host as a trusted site for your org. If you're importing images for any store to use and you don't have a CMS workspace, create one before beginning the import.

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

You can do a bulk import to globally update or add products and related entities for up to 10,000 products using a CSV file. After you import the products, you can use them in any B2C or B2B store.

[Import Data for a Store Using a CSV File](#)

You can do a bulk import to update or add products and related entities for a specific store. You can import up to 10,000 products for a store with the CSV file.

[Import Using Data Loader](#)

We recommend that you use the CSV data import file to import data into the Commerce app. The commerce import file maintains the correct relationships between commerce objects and supports importing up to 10,000 products with nine images each, along with the required updates to records in related objects. Typically, more than 50,000 updates are required to related objects for 10,000 imported commerce products. However, if you want to bulk import more than 10,000 products with nine images each, you can use the Salesforce Data Loader tool.

[Export Commerce Data](#)

Export up to 300,000 products to a CSV file. Only product columns, including product variations, are included in the export. Large exports can result in more than one CSV file. Filters and sorting applied to the product workspace are reflected in the export file. All product fields, both standard and custom, that appear in the workspace are included in the export file.

Image Import for Commerce Stores

Product images and attachments that customers see when visiting your store are typically linked to a Salesforce CMS workspace. Usually the images are stored on a host external to Salesforce. You configure the external host as a trusted site for your org. If you're importing images for any store to use and you don't have a CMS workspace, create one before beginning the import.

When you create a store, the creation process creates a CMS workspace for the store and a public channel to the workspace. When you import to a store, you must use the default workspace for that store. You can't specify that the import process use a different workspace. To use content in the store from another workspace, add the store's public channel to that workspace. See [Add a Channel to a CMS Workspace](#). The content from all workspaces assigned to the store's public channel is available to the store.

Stores based on the LWR platform created in orgs provisioned with Commerce in Summer '23 or later have a public channel to an enhanced CMS workspace. To allow those stores to also access media stored in a non-enhanced workspace, add the store's public channel to the non-enhanced workspace.

[Add Your External Image Host as a Trusted Site](#)

so that your stores can access your product images, add the external host where those images are stored as a Trusted URL.

[Create a CMS Workspace to Import Images to a Commerce Store](#)

When you use a CSV file to import images globally for all stores, you must specify a CMS workspace where the imported images are linked. If you don't have a CMS workspace, create one before you begin the global import process. When you create a store, the creation process creates a default CMS workspace for the store. When you import to a store, you must use the default workspace for that store. You can't specify that the import process use a different workspace.

Add Your External Image Host as a Trusted Site

so that your stores can access your product images, add the external host where those images are stored as a Trusted URL.

1. In Setup, add a Trusted URL.
 - a. For URL, enter the host's URL.
 - b. For Context, select **All**.
 - c. In the CSP Directives section, select **img-src (images)**.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

2. If more than one server hosts your product images, add each server as a Trusted URL.


SEE ALSO:

[Image Import for Commerce Stores](#)

[Create a CMS Workspace to Import Images to a Commerce Store](#)

Create a CMS Workspace to Import Images to a Commerce Store

When you use a CSV file to import images globally for all stores, you must specify a CMS workspace where the imported images are linked. If you don't have a CMS workspace, create one before you begin the global import process. When you create a store, the creation process creates a default CMS workspace for the store. When you import to a store, you must use the default workspace for that store. You can't specify that the import process use a different workspace.

 **Note:** The default language for the CMS workspace is set to the default language of the org. If Translation Workbench is enabled and there are supported languages configured for Translation Workbench, the default language of the CMS is set to the first supported language. You can add other languages to the CMS workspace, but you can't change the default language after the workspace is created.

1. On the Salesforce CMS App navigation menu, select **CMS Workspaces**.
2. Click **Add Workspace**.
3. Enter a name and description for your workspace, and click **Next**.
4. (Optional) Add a channel to a store by selecting it from the list, and click **Next**.
To use images from the CMS in a store, there must be a channel from the CMS workspace to the store. You can go back later and add channels to stores.
5. Select contributors from the list, and click **Next**.
We recommend adding the Commerce Admin and Merchandiser users as contributors.
6. Select a role for each user type, and click **Next**.
7. Select a language for your translated content and move it from the Available list to the Selected list.
8. Select a default language, and click **Next**.
9. Click **Done**.

SEE ALSO:

[Add Your External Image Host as a Trusted Site](#)

[Image Import for Commerce Stores](#)

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

Import Data Globally Using a CSV File

You can do a bulk import to globally update or add products and related entities for up to 10,000 products using a CSV file. After you import the products, you can use them in any B2C or B2B store.

CSV File Format for Importing Data Globally


When you construct a global product import file, specify column headings that correspond to Product, Category, and Price Book information. Each row in the file represents a product and its variations. The column headings are case-insensitive, and the columns can be in any order.

Import Data Globally

Upload and import the CSV file that contains the products that you want to add or update for use by all stores.

CSV File Format for Importing Data Globally

When you construct a global product import file, specify column headings that correspond to Product, Category, and Price Book information. Each row in the file represents a product and its variations. The column headings are case-insensitive, and the columns can be in any order.

 **Important:** To properly encode special characters, save the CSV file in UTF-8 format.


Column Heading	Column Value
Product Name	The name of the product, corresponding to the Product2.Name field. This column is required if you're creating products. If you're updating products, you don't have to include it as long as you uniquely identify the product with SKU, ProductCode, Product Id, or Product ExternalId.
Product Description	(Optional) A description of the product, corresponding to the Product2.Description field.
Product <i>FieldName</i>	<p>The name of a field on the Product2 object. <i>FieldName</i> is the api name of the field. You can use any updateable field on the Product2 object, including a custom field, as a column heading. You can specify as many fields as you want. The import process supports fields with data type checkbox, currency, date, date/time, email, number, percent, phone, picklist, picklist (multiselect), text, text area, text area (long), text area (rich), time, url, or string. The data format in this column depends on the field data type.</p> <ul style="list-style-type: none"> • Checkbox—Allowed values are true or false. • Date, date/time—Values are locale-specific. See Supported Date and Time Formats (ICU). • Picklist—Use the picklist value. • Picklist (Multiselect)—Use the picklist values separated by a semi-colon (;). <p>For formatting guidelines for the other supported data types, see Custom Field Types.</p>
Product Type	The type of the product. You can set the product type if the import creates this product. You can't

EDITIONS


Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer Editions**

Available in: B2B Commerce and D2C Commerce

Column Heading	Column Value
	update the product type for an existing product. If you try to update the product type for an existing product, you don't get an error message, but the type isn't updated.
SKU	<p>The product's stock-keeping unit (SKU) number. SKU is one of the four columns that uniquely identify a product. ProductCode, Product Id, and Product ExternalId are the others. At least one of the four is required in your import file. The SKU column name is equivalent to the Product StockKeepingUnit column name. There's no difference between them functionally, but SKU has fewer characters to enter. This column corresponds to the Product2.StockKeepingUnit field. You can't update the product SKU using the import file.p</p> <p>The SKU field is required for several commerce features, such as cart and checkout, and for importing product image references into Salesforce CMS. If you're creating products, make sure that your import file specifies SKU. If you're updating products, SKU is optional as long as you uniquely identify the product.</p>
Media Listing URL	<p>(Optional) URL to the media to use as the listing image for the product. If you're updating information about the listing media, include the URL, even if you don't want to change it, because the URL uniquely identifies the media. If you're updating existing listing media, the fields that you omit default to the values for the existing listing media. If you are using the enhanced CMS, the URL must use the HTTPS protocol. If you import new media for a product, the import creates a new image in the CMS workspace. This process can result in having multiple copies of the same image in the workspace.</p> <p> Important: When you publish content in a CMS workspace, it's shared to all channels in the workspace, including the public channel. Your content won't have restricted access.</p>
Media Listing Title	(Optional) The title for the listing media. If you include more than 255 characters, the title assigned is the last 255 characters. If you don't include a title, the title is set to the URL path for the media. If the URL path includes more than 255 characters, the title includes only the last 255 characters.
Media Listing AltText	(Optional) Alt text for the media. If you don't include this column, no alt text is assigned to the media.
Media Listing Thumbnail	(Optional) URL for thumbnail media for the product. If you don't include this column, no thumbnail is assigned to the product. Thumbnails aren't supported for enhanced CMS workspaces.
Media Standard URL 1...Media Standard URL 8	(Optional) You can have up to eight columns that contain the URLs to media associated with the product, labeled Media Standard 1,

Column Heading**Column Value**

Column Heading	Column Value
	<p>Media Standard 2, and so on. If you're updating information about the standard media, include the URL, even if you don't want to change it, because the URL uniquely identifies the standard media. If you're updating existing media, the fields that you omit default to the values for the existing media. If you are using the enhanced CMS, the URL must use the HTTPS protocol. If you import new media for a product, the import creates a new image in the CMS workspace. This process can result in having multiple copies of the same image in the workspace.</p> <p> Important: When you publish content in a CMS workspace, it's shared to all channels in the workspace, including the public channel. Your content won't have restricted access.</p>
Media Standard Title 1...Media Standard Title 8	(Optional) The title for the media. If you include more than 255 characters, the title assigned is the last 255 characters. If you don't include a title, the title is set to the URL path for the media. If the URL path includes more than 255 characters, the title includes only the last 255 characters.
Media Standard AltText 1...Media Standard AltText 8	(Optional) Alt text for the media. If you don't include this column, no alt text is assigned to the media.
Media Standard Thumbnail 1...Media Standard Thumbnail 8	(Optional) URL for thumbnail media for the product. If you don't include this column, no thumbnail is assigned to the product. Thumbnails aren't supported for enhanced CMS workspaces.
Media Standard sortOrder 1...Media Standard sortOrder 8	(Optional) This value determines the order in which media is displayed on the product detail page. Valid values are 1 through 8. If you don't include this column, sort order 1 is assigned to the media. Import fails if the same sort order value is assigned to more than one standard media for a product.
ProductCode	The product's unique Product Code. ProductCode is one of four columns that uniquely identify a product. SKU, Product Id, and Product ExternalId are the others. At least one of the four is required in your import file. This column corresponds to the Product2.ProductCode field. If you identify an existing product using a SKU column, you can update the Product Code to a new value that you specify in this column.
Product ExternalId	The product's External ID. Product ExternalId is one of four columns that uniquely identify a product. SKU, Product Id, and ProductCode are the others. At least one of the four is required in your import file. This column corresponds to the Product2.ExternalId field. If you identify an existing product using either a SKU or a ProductCode column, you can update the External ID to a new value that you specify in this column.

Column Heading	Column Value
Product Id	The Product ID. Product Id is one of four columns that uniquely identify a product. SKU, Product ExternalId, and ProductCode are the others. At least one of the four is required for your import file. This column corresponds to Product2.Id. The Product ID is assigned automatically when the product is created. You can't set it to a specific value, and you can't change it after the product is created.
Product Family	(Optional) A grouping for products, corresponding to the Product2.Family field. Group products any way you like. You can use product family values as filters for search results.
Product isActive	(Optional) A value indicating if the product is active, corresponding to the Product2.IsActive field. By default, newly created products are inactive. To make a product active, specify <code>true</code> in this column. To make a product inactive, specify <code>false</code> , leave the column blank, or omit the column.
Category 1... Category 5	(Optional) You can have up to five category columns, labeled Category 1, Category 2, and so on. You can't update existing categories for a product. You can only add new categories. For the first category, you can use the label Category without the number 1. In a category column, you can specify a nested category, using the / character to separate the levels. For example, Products/Machines/Esspresso.
Entitlement 1... Entitlement 50	(Optional) The name of an entitlement policy to associate with the product. You can specify up to 50 entitlement policies in columns labeled Entitlement 1, Entitlement 2, and so on. You can't update existing entitlement policies for a product. You can only add new entitlement policies. Create the entitlement policies before you import the CSV file. For more information, see Create an Entitlement Policy on page 89. For the first entitlement policy, you can use the label Entitlement without the number 1.
Price <values>	To specify prices, use a column labeled Price, followed by optional values. The import process determines where to add the prices based on the values, if any, that you include in the column label. <ul style="list-style-type: none"> • Price or Price <currency code>—When you use Price as the column label, or Price followed by a currency code, you're asked which price book to use during the import process. The prices in all columns without an alias are added to the same price book. If a currency code isn't specified, the default is the currency code for the user who's running the import. • Price (alias) or Price (alias) currency code—You can use any alias you want to describe a price book. For each

Column Heading**Column Value**

Column Heading	Column Value
	<p>alias, you're asked which price book to use during the import process. The prices in all columns using the same alias are added to the same price book. If a currency code isn't specified, the default is the currency code for the user who's running the import.</p> <ul style="list-style-type: none"> • Price <i>price book ID</i> or Price <i>price book ID currency code</i>—The system adds the prices to the price book with the specified ID. If a currency code isn't specified, the default is the currency code for the user who's running the import.
Variation AttributeSet	<p>The attribute set for the variations of the product. Use the Variation AttributeSet API name for the column heading. This column is required if you specify product variations. Create the attribute set before importing the CSV file. For more information, see Create Attributes for Product Variations on page 82.</p>
Variation Parent <i><identifier></i>	<p>The parent product for the variation. In the column heading, include an identifier to indicate the value that you're using to identify the parent. Valid column headings are:</p> <ul style="list-style-type: none"> • Variation Parent (Id)—Use Product ID. • Variation Parent (StockKeepingUnit)—Use SKU. • Variation Parent (ProductCode)—Use Product Code. • Variation Parent (ExternalId)—Use External ID to identify variation parent. <p>The parent product must exist or be specified in the CSV file before the variations are created.</p>
Variation Attribute Name 1... Variation Attribute Name 5	<p>The API name of a variation attribute in the variation attribute set. A variation attribute is a custom field on the Product Attribute object, so <i>__c</i> is appended to the name, for example, <i>Bag_Size__c</i>. At least one Variation Attribute Name column is required for each attribute set, labeled Variation Attribute Name 1. You can have up to five attribute name columns, labeled Variation Attribute Name 2, Variation Attribute Name 3, and so on. You must create the variation attributes for importing the CSV file. For more information, see Create Attributes and Attribute Sets for Product Variations.</p>
Variation Attribute Value 1...Variation Attribute Value 5	<p>The value of the attribute specified in the attribute name column. This column is required for each Variation Attribute Name column.</p>

SEE ALSO:

[Import Data Globally](#)

Import Data Globally

Upload and import the CSV file that contains the products that you want to add or update for use by all stores.

To import prices requires a price book. To import images requires a CMS workspace. To import products and images, we recommend that you use two imports. First import the product, and then import the images. With this approach, you can work with the product data while the image import completes.

If you use the import file to create product variations, create the variation attributes and variation attribute sets before doing the import. If you use the import file to specify an entitlement policy, create the entitlement policy before doing the import.

1. On the Product Workspace page, click **Import**.
2. Click **Upload Files**.
You can optionally download a simple or advanced CSV template file to use as a starting point for your own file.
3. Navigate to your CSV import file and open it.
4. Click **Import**.
5. Select the catalog, price books, and CMS workspace for the import.
6. Click **Start Import**.
Because the import is asynchronous, you can perform other tasks while the import processes. When the import finishes, the Commerce app posts an import completed notification. The Import Summary report shows the import results, including any errors caused by rows or column headings. If you have errors, fix the file, and import it again.
7. (Optional) Cancel the import.
 - a. In the Import Summary, click **Cancel**.
 - b. Confirm the cancellation, and click **Cancel Import**.

SEE ALSO:

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

[CSV File Format for Importing Data Globally](#)

Import Data for a Store Using a CSV File

You can do a bulk import to update or add products and related entities for a specific store. You can import up to 10,000 products for a store with the CSV file.

[CSV File Format for Importing Data for a Store](#)

When you construct a data import file for a store, specify column headings that correspond to Product, Category, and Price information. During a store import, prices are imported into the store's default price books. To import to a nondefault price book, use a global import, which is available from the Product Workspace. Each row in the file represents a product and its variations. The column headings are case-insensitive, and the columns can be in any order.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

Default Entities for Import to Stores


When you create a store, several records for the store are created by default. If the store creation process encounters an error when trying to create the defaults, the store is created without the defaults. In that case, the store defaults are created the first time that you import data into the store. You can create and assign different records to the store, but the only default record you can delete is the category. When you use a CSV file to import data into the store, the imported data is assigned to the default records.

Import Data for a Store

After your store is created, you can import data by creating a data import file—a CSV file formatted specifically for B2B and B2C stores. The import affects products and their associated entities, such as price books and categories. The user who performs the import owns the records created by a data import.

CSV File Format for Importing Data for a Store

When you construct a data import file for a store, specify column headings that correspond to Product, Category, and Price information. During a store import, prices are imported into the store's default price books. To import to a nondefault price book, use a global import, which is available from the Product Workspace. Each row in the file represents a product and its variations. The column headings are case-insensitive, and the columns can be in any order.

 **Important:** To properly encode special characters, save the CSV file in UTF-8 format.



Column Heading	Column Value
Product Name	The name of the product, corresponding to the Product2.Name field. This column is required if you're creating products. If you're updating products, you don't have to include it as long as you uniquely identify the product with SKU, ProductCode, Product Id, or Product ExternalId.
Product Description	(Optional) A description of the product, corresponding to the Product2.Description field.
Product <i>FieldName</i>	<p>The name of a field on the Product2 object. <i>FieldName</i> is the api name of the field. You can use any updateable field on the Product2 object, including a custom field, as a column heading. You can specify as many fields as you want. The import process supports fields with data type checkbox, currency, date, date/time, email, number, percent, phone, picklist, picklist (multiselect), text, text area, text area (long), text area (rich), time, url, or string. The data format in this column depends on the field data type.</p> <ul style="list-style-type: none"> • Checkbox—Allowed values are true or false. • Date, date/time—Values are locale-specific. See Supported Date and Time Formats (ICU). • Picklist—Use the picklist value. • Picklist (Multiselect)—Use the picklist values separated by a semi-colon (;).


EDITIONS



Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**


Available in: B2B Commerce and D2C Commerce

Column Heading	Column Value
	For formatting guidelines for the other supported data types, see Custom Field Types .
Product Type	The type of the product. You can set the product type if the import creates this product. You can't update the product type for an existing product. If you try to update the product type for an existing product, you don't get an error message, but the type isn't updated.
SKU	<p>The product's stock-keeping unit (SKU) number. SKU is one of the four columns that uniquely identify a product. ProductCode, Product Id, and Product ExternalId are the others. At least one of the four is required in your import file. The SKU column name is equivalent to the Product StockKeepingUnit column name. There's no difference between them functionally, but SKU has fewer characters to enter. This column corresponds to the Product2.StockKeepingUnit field. You can't update the product SKU using the import file.</p> <p> Note: The SKU field is required for several commerce features, such as cart and checkout, and for importing product image references into Salesforce CMS. If you're creating products, make sure that your import file specifies SKU. If you're updating products, SKU is optional as long as you uniquely identify the product.</p>
Slug <language code>	(Optional) The SEO-friendly URL slug in a specified language for the product. In the column heading, use a platform-only language code that's active in your org, site, and store. For example, <code>slug_en_US</code> . URL slugs have a character limit of 150 and allow these characters: <code>a-z A-Z 0-9 . - _ \$ & : ; * , = @</code> . Foreign language characters are also allowed. Use of the term <code>Product2</code> isn't allowed in a URL slug. This URL is reserved for use in your site.
Media Listing URL	<p>(Optional) URL to the media to use as the listing image for the product. If you're updating information about the listing media, include the URL, even if you don't want to change it, because the URL uniquely identifies the media. If you're updating existing listing media, the fields that you omit default to the values for the existing listing media. If you're using the enhanced CMS, the URL must use the HTTPS protocol. If you import new media for a product, the import creates a new image in the CMS workspace. This process can result in having multiple copies of the same image in the workspace.</p> <p> Important: When you publish content in a CMS workspace, it's shared to all channels in the workspace, including the public channel. Your content won't have restricted access.</p>

Column Heading	Column Value
Media Listing Title	(Optional) The title for the listing media. If you include more than 255 characters, the title assigned is the last 255 characters. If you don't include a title, the title is set to the URL path for the media. If the URL path includes more than 255 characters, the title includes only the last 255 characters.
Media Listing AltText	(Optional) Alt text for the media. If you don't include this column, no alt text is assigned to the media.
Media Listing Thumbnail	(Optional) URL for thumbnail media for the product. If you don't include this column, no thumbnail is assigned to the product. Thumbnails aren't supported for enhanced CMS workspaces.
Media Standard URL 1...Media Standard URL 8	<p>(Optional) You can have up to eight columns that contain the URLs to media associated with the product, labeled Media Standard 1, Media Standard 2, and so on. If you're updating information about the standard media, include the URL, even if you don't want to change it, because the URL uniquely identifies the standard media. If you're updating existing media, the fields you that omit default to the values for the existing media. If you're using the enhanced CMS, the URL must use the HTTPS protocol. If you import new media for a product, the import creates a new image in the CMS workspace. This process can result in having multiple copies of the same image in the workspace.</p> <p> Important: When you publish content in a CMS workspace, it's shared to all channels in the workspace, including the public channel. Your content won't have restricted access.</p>
Media Standard Title 1...Media Standard Title 8	(Optional) The title for the media. If you include more than 255 characters, the title assigned is the last 255 characters. If you don't include a title, the title is set to the URL path for the media. If the URL path includes more than 255 characters, the title includes only the last 255 characters.
Media Standard AltText 1...Media Standard AltText 8	(Optional) Alt text for the media. If you don't include this column, no alt text is assigned to the media.
Media Standard Thumbnail 1...Media Standard Thumbnail 8	(Optional) URL for thumbnail media for the product. If you don't include this column, no thumbnail is assigned to the product. Thumbnails aren't supported for enhanced CMS workspaces.
Media Standard sortOrder 1...Media Standard sortOrder 8	(Optional) This value determines the order in which media is displayed on the product detail page. Valid values are 1 through 8. If you don't include this column, sort order 1 is assigned to the media. Import fails if the same sort order value is assigned to more than one standard media for a product.
ProductCode	The product's unique product code. ProductCode is one of four columns that uniquely identify a product. SKU, Product Id, and Product ExternalId are the others. At least one of the four is required

Column Heading	Column Value
Product ExternalId	<p>in your import file. This column corresponds to the Product2.ProductCode field. If you identify an existing product using a SKU column, you can update the Product Code to a new value that you specify in this column.</p>
Product Id	<p>The product's external ID. Product ExternalId is one of four columns that uniquely identify a product. SKU, Product Id, and ProductCode are the others. At least one of the four is required in your import file. This column corresponds to the Product2.ExternalId field. If you identify an existing product using either a SKU or a ProductCode column, you can update the External ID to a new value that you specify in this column.</p>
Product Family	<p>The Product ID. Product Id is one of four columns that uniquely identify a product. SKU, Product ExternalId, and ProductCode are the others. At least one of the four is required for your import file. This column corresponds to Product2.Id. The Product ID is assigned automatically when the product is created. You can't set it to a specific value, and you can't change it after the product is created.</p>
Product isActive	<p>(Optional) A grouping for products, corresponding to the Product2.Family field. Group products any way you like. You can use product family values as filters for search results.</p>
Category1... Category 5	<p>(Optional) A value indicating if the product is active, corresponding to the Product2.IsActive field. By default, newly created products are inactive. To make a product active, specify <code>true</code> in this column. To make a product inactive, specify <code>false</code>, leave the column blank, or omit the column.</p>
Entitlement 1... Entitlement 50	<p>If you're creating a product, you must specify at least one category column, labeled as Category 1, but you can have up to five category columns, labeled Category 2, Category 3, and so on. You can't update existing categories for a product. You can only add new categories. If you're updating an existing product, you don't have to have category columns in the CSV file.</p> <p> Note: For the first category, you can use the label Category without the number 1.</p> <p> Note: In a category column, you can specify a nested category, using the / character to separate the levels. For example, Products/Machines/Esspresso.</p>
Entitlement 1... Entitlement 50	<p>(Optional) The name of an entitlement policy to associate with the product. You can specify up to 50 entitlement policies in columns labeled Entitlement 1, Entitlement 2, and so on. Create the entitlement policies before you import the CSV file. This column is applicable only for B2B stores. B2C stores can have only one entitlement policy and use the default entitlement policy assigned</p>

Column Heading**Column Value**

Column Heading	Column Value
	<p>to the store during import. You can't update existing entitlement policies for a product. You can only add new entitlement policies. For more information about entitlement policies, see Create an Entitlement Policy on page 89.</p> <p> Note: For the first entitlement policy, you can use the label Entitlement without the number 1.</p>
Price or Price <currency code>	The import process adds prices in a column labeled Price, or Price followed by a currency code, to the store's default price book. These prices are the default prices used for buyers and shoppers visiting your store. If a currency code isn't specified, the default is the currency code for the user who's running the import.
Price (sales) or Price (sales) <currency code>	Instead of using Price or Price <currency code> as column labels, you can use the Price (sales) or Price (sales) <currency code> label. These column labels are equivalent, and prices in a Price (sales) column are also added to the default price book.
Price (original) or Price (original) <currency code>	The import process adds prices that are labeled Price (original) or Price (original) followed by a currency code to the store's strikethrough price book. When a shopper views the product in your store, this price is struck out to indicate that a new price is being offered. The struck-out price is for display purposes and not used for calculations. If a currency code isn't specified, the default is the currency code for the user who's running the import. Prices in a Price (original) column are added to the store's default strikethrough price book.
Variation AttributeSet	The attribute set for the variations of the product. Use the Variation AttributeSet API name for the column heading. This column is required if you specify product variations. You must create the attribute set before importing the CSV file. In the CSV file, the parent product must be created before the product variations are created. The parent product must be listed on a row above any variations. If the variation parent exists, you can omit it from the file. For more information, see Create Attributes and Attribute Sets for Product Variations .
Variation Parent <identifier>	<p>The parent product for the variation. In the column heading, include an identifier to indicate the value that you're using to identify the parent. Valid column headings are:</p> <ul style="list-style-type: none"> • Variation Parent (Id)—Use Product ID. • Variation Parent (StockKeepingUnit)—Use SKU. • Variation Parent (ProductCode)—Use Product Code. • Variation Parent (ExternalId)—Use External ID to identify variation parent.

Column Heading	Column Value
	The parent product must exist or be specified in the CSV file before the variations are created.
Variation Attribute Name 1...Variation Attribute Name 5	The API name of a variation attribute in the variation attribute set. A variation attribute is a custom field on the Product Attribute object, so __c is appended to the name, for example, Bag_Size__c. At least one Variation Attribute Name column is required for each attribute set, labeled Variation Attribute Name 1. You can have up to five attribute name columns, labeled Variation Attribute Name 2, Variation Attribute Name 3, and so on. You must create the variation attributes for importing the CSV file. For more information, see Create Attributes and Attribute Sets for Product Variations .
Variation Attribute Value 1...Variation Attribute Value 5	The value of the attribute specified in the attribute name column. This column is required for each Variation Attribute Name column.

SEE ALSO:

[Default Entities for Import to Stores](#)

[Import Data for a Store](#)

Default Entities for Import to Stores

When you create a store, several records for the store are created by default. If the store creation process encounters an error when trying to create the defaults, the store is created without the defaults. In that case, the store defaults are created the first time that you import data into the store. You can create and assign different records to the store, but the only default record you can delete is the category. When you use a CSV file to import data into the store, the imported data is assigned to the default records.


- **Catalog**—Each store has a default catalog named after the store. For example, if your store is named MyStore, your default catalog is MyStore Catalog. The default catalog includes one default category, Products. If you import data to use globally for all stores, you can select which catalog and category to assign to the product. When you import data for a specific store, every product that you import is associated with your store’s default catalog and category.
- **Buyer group**—Each store has a default buyer group, which is a collection of accounts that have common access to specific entitlements. You can’t use global or store import to assign products to a buyer group.
- **Entitlement policy**—Each store has a default entitlement policy, which defines the products and product-related information that shoppers can see based on their buyer group membership. B2C stores can have only one entitlement policy. B2B stores can use multiple entitlement policies. When you import data to use globally, you can assign products to entitlement policies. When you use store import, every product is assigned to the store’s default entitlement policy. For B2B stores, you can also assign a product to additional entitlement policies.
- **Store price book**—Each store has a default price book and a default strikethrough price book named after the store. For example, if your store is named MyStore, your default price book is MyStore Price Book. The default strikethrough price book is MyStore Strikethrough Price Book. When you import data to use globally, you can select the price books to assign to the products. When you use store import, you must use the default price book and default strikethrough price book.

EDITIONS


Available in: **Lightning Experience** and **Salesforce mobile app**

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: **B2B Commerce and D2C Commerce**

 **Note:** Each Salesforce org has a global standard price book that contains all your products. The standard price book isn't associated with a specific store. It applies across all your stores. A product must be listed in your standard price book before it can be listed in any other price book. When you import data, specify two prices for each product—one for your store's price book, and one for your store's strikethrough price book. The import process updates the associated price books and uses the first price specified in the row to update the standard price book. For example, if the first column in the row specifies a price for the store's strikethrough price book, that price is used to update the standard price book.

- **CMS workspace**—When you create a store, the creation process creates a CMS workspace for the store and a public channel to the workspace. If the creation process is unable to create the workspace, the first time that you import data to the store, the import process creates the workspace and a public channel to the workspace. You must use this workspace when importing to the store. You can't specify that the import process use a different workspace. To use content in the store from another workspace, assign the store's public channel to that workspace. The content from all workspaces assigned to the store's public channel is available to the store. The default language for the CMS workspace is set to the default language of the org. If Translation Workbench is enabled and there are supported languages configured for Translation Workbench, the default language of the CMS is set to the first supported language. You can add other languages to the CMS workspace, but you can't change the default language after the workspace is created.

 **Note:** Before you activate your store, we recommend that you use the Digital Experiences app to change the domain for the public channel associated with the store's CMS workspace. Make the domain match the domain that you configure for your store. For instructions on configuring a custom domain for your store, see [Configure a Custom Domain and CDN](#). For instructions on using the Digital Experiences app to configure the domain for a CMS public channel, see [Configure Salesforce CDN for Digital Experiences in Salesforce CMS](#).

SEE ALSO:

[CSV File Format for Importing Data for a Store](#)

[Import Data for a Store](#)

Import Data for a Store

After your store is created, you can import data by creating a data import file—a CSV file formatted specifically for B2B and B2C stores. The import affects products and their associated entities, such as price books and categories. The user who performs the import owns the records created by a data import.

To import prices requires a price book. To import images requires a CMS workspace. To import products and images, we recommend that you use two imports. First import the product, and then import the images. With this approach, you can work with the product data while the image import completes.

If you use the import file to create product variations, you must create the variation attributes and variation attribute sets before doing the import.

1. On your store's home page, click the **Import** tile.
2. Click **Choose File**.
You can optionally download a sample data import file to use as a starting point for creating your file.
3. Navigate to your data import file and open it.
4. Click **Import**.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

Because the import is asynchronous, you can perform other tasks while the import processes. When the import finishes, the Commerce app posts an import completed notification. The Import Summary report shows the import results, including any errors caused by rows or column headings. If you have errors, fix the file, and import it again.

5. (Optional) Cancel the import.
 - a. In the Import Summary, click **Cancel**.
 - b. Confirm the cancellation, click **Cancel Import**.
6. Create a channel from your store to the CMS workspace.

If you created your store in Summer '23 or later, you can skip this step. The CMS workspace and a public channel to that workspace were created when the store was created.

 - a. On your store's home page, click **Content Management**.
 - b. Click the workspace for your store.

The default workspace for the store is named with the name of your store followed by Managed Content Space and a random 8-character string. For example, if your store is named Alpine, the CMS workspace is named something like Alpine Managed Content Space padY7vEq.
 - c. Click **Channels**.
 - d. Click **Add Channel**.
 - e. Select your store from the list.
 - f. Click **Add**.

SEE ALSO:

[CSV File Format for Importing Data for a Store](#)

Import Using Data Loader

We recommend that you use the CSV data import file to import data into the Commerce app. The commerce import file maintains the correct relationships between commerce objects and supports importing up to 10,000 products with nine images each, along with the required updates to records in related objects. Typically, more than 50,000 updates are required to related objects for 10,000 imported commerce products. However, if you want to bulk import more than 10,000 products with nine images each, you can use the Salesforce Data Loader tool.

If you use Data Loader, you must explicitly maintain the correct relationship between objects. You can use Schema Builder to discover how objects are related. For information about how to use Schema Builder, see [Work with Schema Builder](#).

For information about using Data Loader, see [Data Loader](#).

SEE ALSO:

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

[Import Data for a Store Using a CSV File](#)

EDITIONS

Available in: **Lightning Experience** and **Salesforce mobile app**

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: **B2B Commerce and D2C Commerce**

Export Commerce Data

Export up to 300,000 products to a CSV file. Only product columns, including product variations, are included in the export. Large exports can result in more than one CSV file. Filters and sorting applied to the product workspace are reflected in the export file. All product fields, both standard and custom, that appear in the workspace are included in the export file.

Exporting translations isn't supported. Products are exported in the language in which they were created.

1. On the Products Workspace page, click **Export** from the dropdown menu.
2. Click **Start Export**.
You're notified when the export is complete.
3. To see the export results, go to **Commerce Setup > Tools > Export**.

The export and import CSV files use the same header format. To make bulk updates, you can edit the export CSV file and then use it as the import CSV file. See [Import Data Globally Using a CSV File](#).

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited,** and **Developer Editions**

Available in: B2B Commerce and D2C Commerce

Access

For B2B and B2C stores, you specify which profiles and permission sets can access a store. For B2C stores, you can set up self-registration so that shoppers can create an account and log in. B2B stores don't allow self-registration. For B2B stores, use buyer contacts, accounts, and groups to specify which buyers can access the store as authenticated users. You can allow guest browsing for both B2B and B2C stores.

[Add Profiles and Permissions for B2B and B2C Store Community Members](#)

Specify which profiles and permission sets are members of the store community. Only users with profiles or permission sets that are part of a store's community can access the store.

[Configure Self-Registration for B2C Stores](#)

When you enable self-registration for a B2C store, shoppers can create their own account. When shoppers have an account, they can log in to your store using that account instead of as a guest.

[Manage Buyer Access to B2B Stores](#)

Create buyers using either a business account or a person account. Add the business or person account to a buyer group. Associate the buyer group with a store. The products and prices buyers can access in the store are determined by the entitlement policies assigned to the buyer group.

[Manage Guest Access](#)

A guest is someone who isn't logged in to your store as an authenticated customer. Depending on the level of access that you provide, you can let guests browse your store, add products to their cart, and place orders.

Add Profiles and Permissions for B2B and B2C Store Community Members

Specify which profiles and permission sets are members of the store community. Only users with profiles or permission sets that are part of a store's community can access the store.

The person who created the store, or a person with the same profile as the person who created the store, must perform this task.

1. From Setup, in the Quick Find box, enter *Feature Settings*, select **Digital Experiences** and then select **All Sites**.
2. Next to your store name, select **Workspaces**.
3. On the My Workspaces page, click the **Administration** tile.
4. In the left pane, click **Members**.
5. From the Search dropdown, select **All**.
6. In the Available Profiles list, drag the profiles for your internal users, such as System Administrator and Commerce Business User, along with any other applicable profiles, such as your Shopper profile, to the **Selected Profiles** list. The user who created the store is already listed under Selected Profiles. For example, if you created the store as the Commerce Business User, the Commerce Business User profile is listed under Selected Profiles.
7. In the Permission Sets list, drag the permission sets that you want to have access to the store, such as buyers, buyer managers, or account switchers, to the **Selected Permission Sets** list.
8. Click **Save**.

SEE ALSO:

[Add Members to Your Experience Cloud Site](#)

Configure Self-Registration for B2C Stores

When you enable self-registration for a B2C store, shoppers can create their own account. When shoppers have an account, they can log in to your store using that account instead of as a guest.

1. Before configuring self-registration, publish the initial draft of your store. Publishing your store doesn't make it available to shoppers. The store isn't available to shoppers until you activate it.
 - a. On your store's home page, click the **Experience Builder** tile.
 - b. In the upper-right corner of the Experience Builder page, click **Publish**. You receive an email when the store is published.
2. From Setup, in the Quick Find box, enter *Feature Settings*, select **Digital Experiences**, and then select **All Sites**.
3. Next to your store name, select **Workspaces**.
4. On the My Workspaces page, click the **Administration** tile.
5. Click **Login & Registration**.
6. Under Login Page Setup, from the Login Page Type dropdown, select **Experience Builder Page**, and in the text box enter *main*.
7. Under Registration Page Confirmation, select **Allow customers and partners to self-register**.
 - a. From the Registration Page Type dropdown, select **Experience Builder Page**, and in the text box, enter *main*.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited,** and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited,** and **Developer** Editions

Available in: D2C Commerce

- b. From the Profile dropdown, select your Shopper profile.
 - c. From the Permission Set Group dropdown, select your Shopper permission set group.
8. Click **Save**.
9. On your store's home page, click the **Experience Builder** tile.
10. Click the gear icon and select **Settings > General**.
11. Under Guest User Profile, click the link.
The Set Up Profiles window opens.
12. Navigate to the **Record Type Settings** section.
13. Under Accounts, click **Edit**.
14. Move Person Account from Available Record Types to **Selected Record Types**.
15. Under Default Record Type, from the Default dropdown, select **Person Account**.
16. Click **Save**.

SEE ALSO:

[Manage Guest Access](#)

[Publish Your Store](#)

Manage Buyer Access to B2B Stores

Create buyers using either a business account or a person account. Add the business or person account to a buyer group. Associate the buyer group with a store. The products and prices buyers can access in the store are determined by the entitlement policies assigned to the buyer group.

[Use a Business Account to Create Buyers for B2B Stores](#)

Enable the business account as a buyer account. Create contacts for the buyer account and enable those contacts as customer users.

[Use a Person Account to Create a Buyer for B2B Stores](#)

Create a person account and enable it as a buyer account and a customer user. The individual identified in the person account has access to stores related to the account's buyer group.

[Add Accounts to a Buyer Group for B2B Stores](#)

To give multiple accounts access to the same store, price books, and entitlements, add the accounts to a buyer group.

[Associate a Buyer Group with a B2B Store](#)

Product prices and the products that buyers can access depend on the price books and the entitlement policies assigned to the buyer group. When you create a store, a default buyer group is assigned to the store.

[Add Billing and Shipping Addresses for Buyer Accounts for B2B Stores](#)

Set the default billing and shipping addresses for buyer accounts.

[Allow Buyers Access to External Accounts for B2B Stores](#)

An external account is an account other than the one that a buyer is a contact for. You can enable a buyer to buy for an external account. You can also enable a buyer to manage buyers in an external account by assigning them the Buyer Manager role. A buyer manager can create and activate buyers in other accounts, reset passwords, and view the carts that other buyers create. When shopping in a B2B store, the designated buyer can switch to an external account that they have access to. The buyer can purchase on behalf of that account or manage buyers in that account, depending on how you've configured their privileges.

[Mass Enable Accounts as Buyer Accounts](#)


Use any tool or mechanism that can create data inside of Salesforce—for example, Data Loader, Flow Builder, or the sObject API—to enable accounts as buyer accounts.

Use a Business Account to Create Buyers for B2B Stores

Enable the business account as a buyer account. Create contacts for the buyer account and enable those contacts as customer users.

When a business account is enabled as a buyer, you can't merge it with other accounts and you can't convert the business account to a person account. To merge or convert the account, you must disable it as a buyer, merge or convert the account, and then reenable it as a buyer.

1. From the Commerce navigation app menu, click **Accounts**.
2. Click **New**.
3. If you're given an option of what kind of account to create, select **Business Account** and then click **Next**.
4. Enter the account information, and click **Save**.

 **Important:** In the Account Currency dropdown, select the buyer account's preferred currency. If you don't choose an account currency, or if you choose a currency that your store doesn't support, buyers see prices in the store's default currency. The currency you select for the account applies to all buyers on the account, overriding the currency set on an individual buyer's record. If you change the account currency, buyers' in-progress carts are cleared.

5. From the Actions dropdown, select **Enable as Buyer**.


6. Add a contact to the account.

A contact for a buyer account can access stores to which the account's buyer group is associated.

- a. Click **Related**, and next to Contacts, click **New**.
- b. Enter the contact information, and click **Save**.
- c. Select the new contact and from the Actions dropdown, select **Enable Customer User**.
- d. Enter a username, email, and nickname for the user.
- e. Select the license, profile, and permission set for the user.

The permission set that you choose determines the kind of access that the buyer has to the store. See [Permission Sets for Buyers, Buyer Managers, and Account Switchers for B2B Stores](#).

- f. Click **Save**.

 **Note:** If you disable the account as a buyer, you delete the account's association with buyer groups.

SEE ALSO:

- [Add Accounts to a Buyer Group for B2B Stores](#)
- [Associate a Buyer Group with a B2B Store](#)
- [Add Billing and Shipping Addresses for Buyer Accounts for B2B Stores](#)
- [Use a Person Account to Create a Buyer for B2B Stores](#)

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce


Use a Person Account to Create a Buyer for B2B Stores

Create a person account and enable it as a buyer account and a customer user. The individual identified in the person account has access to stores related to the account's buyer group.


Make sure that person accounts are enabled for your org. See [Enable Person Accounts for Commerce](#).

When a person account is enabled as a buyer, you can't merge it with other accounts and you can't convert the person account to a business account. To merge or convert the account, you must disable it as a buyer, merge or convert the account, and then reenable it as a buyer.

1. From the Commerce navigation app menu, click **Accounts**.
2. Click **New**.
3. Select **Person Account**, and then click **Next**.
4. Enter the account information, and click **Save**.

 **Important:** In the Account Currency dropdown, select the preferred currency. If you don't choose an account currency, or if you choose a currency that a store doesn't support, the buyers see prices in the store's default currency. If you change the account currency, buyers' in-progress carts are cleared.

5. From the Actions dropdown, select **Enable as Buyer**.
6. From the Actions dropdown, select **Enable Customer User**.
7. Enter a username, email, and nickname for the user.
8. Select the license, profile, and permission set for the user.
The permission set that you choose determines the kind of access that the buyer has to the store. See [Permission Sets for Buyers, Buyer Managers, and Account Switchers for B2B Stores](#).
9. Click **Save**.

 **Note:** If you disable the account as a buyer, you delete the account's association with buyer groups.

SEE ALSO:

- [Use a Business Account to Create Buyers for B2B Stores](#)
- [Add Accounts to a Buyer Group for B2B Stores](#)
- [Associate a Buyer Group with a B2B Store](#)

Add Accounts to a Buyer Group for B2B Stores

To give multiple accounts access to the same store, price books, and entitlements, add the accounts to a buyer group.

 **Note:** To unassign an account assigned to a buyer group by another user requires the Modify All Data on Buyer Group permission.

1. From the Commerce navigation app menu, click **Buyer Groups**.
If your account record includes a Buyer Group related list, you can assign and unassign accounts from buyer groups directly from the account record.
2. Click **New**.
3. Enter a name and description, and click **Save**.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce

4. On the Related tab, next to Buyer Group Members, click **Assign**.
5. Select the accounts that you want to add to the buyer group.
6. Click **Assign**.

SEE ALSO:

- [Use a Business Account to Create Buyers for B2B Stores](#)
- [Associate a Buyer Group with a B2B Store](#)
- [Add Billing and Shipping Addresses for Buyer Accounts for B2B Stores](#)

Associate a Buyer Group with a B2B Store

Product prices and the products that buyers can access depend on the price books and the entitlement policies assigned to the buyer group. When you create a store, a default buyer group is assigned to the store.

1. From the Commerce App Navigation menu, select **Buyer Groups**.
2. Click the buyer group that you want to assign to the store.
3. On the Related tab, next to Stores, click **Assign**.
4. Select the store you want to assign to the buyer group.
5. Click **Save**.

SEE ALSO:

- [Use a Business Account to Create Buyers for B2B Stores](#)
- [Add Accounts to a Buyer Group for B2B Stores](#)
- [Add Billing and Shipping Addresses for Buyer Accounts for B2B Stores](#)

Add Billing and Shipping Addresses for Buyer Accounts for B2B Stores

Set the default billing and shipping addresses for buyer accounts.

1. Go to your buyer account, and click the **Related** tab.
2. Next to Contact Point Addresses, click **New**.
You can create up to 2,000 contact point address records. Additional records are dropped.
3. Select the **Address Type**, either **Billing** or **Shipping**.
4. If you want this address to be the default address, select **Is Default Address**.
5. Enter the address.

For stores based on LWR (Lightning Web Runtime), only two-digit ISO codes are allowed for the Country and State or Province. We recommend that the Salesforce Admin enable state and country picklists so that only allowed values are available to select. See [Enable and Disable State and Country/Territory Picklists](#).

EDITIONS

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Available in: B2B Commerce

EDITIONS

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Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce

6. Save your changes.

SEE ALSO:

- [Use a Business Account to Create Buyers for B2B Stores](#)
- [Add Accounts to a Buyer Group for B2B Stores](#)
- [Associate a Buyer Group with a B2B Store](#)

Allow Buyers Access to External Accounts for B2B Stores

An external account is an account other than the one that a buyer is a contact for. You can enable a buyer to buy for an external account. You can also enable a buyer to manage buyers in an external account by assigning them the Buyer Manager role. A buyer manager can create and activate buyers in other accounts, reset passwords, and view the carts that other buyers create. When shopping in a B2B store, the designated buyer can switch to an external account that they have access to. The buyer can purchase on behalf of that account or manage buyers in that account, depending on how you've configured their privileges.

A buyer that you designate to access an external account must be assigned the preconfigured Buyer Manager permission set. The assignment must include system permissions or be assigned an equivalent custom permission set. The buyer must have the Customer Community Plus license or a license with a higher level of privileges.

A buyer that you designate to manage buyers in an external account must also have delegated external user administration rights, which you assign to the buyer's profile. For more information, see [Delegate External User Administration](#).

The buyer's account and the external account must be part of buyer groups that are assigned to the same store. You can create up to 200 external managed accounts per user.

1. Configure the buyer's account.
 - a. From the buyer's account record, go to the External Managed Account related list.
 - b. Click **Configure**.
 - c. Enter a name for this external managed account record.
 - d. For User, enter the name of the buyer.
 - e. For Target Account, enter the name of the external account that the buyer can switch to.
 - f. Under Authorized Access, select the privilege level to assign to the buyer for the account and move it to the Selected Access list.

To allow the buyer to purchase on behalf of the external account, select **Buy For**. To allow the buyer to manage users in the external account, select **Manage Users**.
 - g. Save your changes.
2. Share the external account with the buyer.

You can create Apex-based rules to automate sharing. For information, see [Sharing a Record Using Apex](#).

 - a. From the account record of the external account, select **Sharing** from the dropdown menu.
 - b. In the Search dropdown, select **Customer Portal User**.
 - c. Search for the buyer.

Leave Account Access as Read Only.

EDITIONS

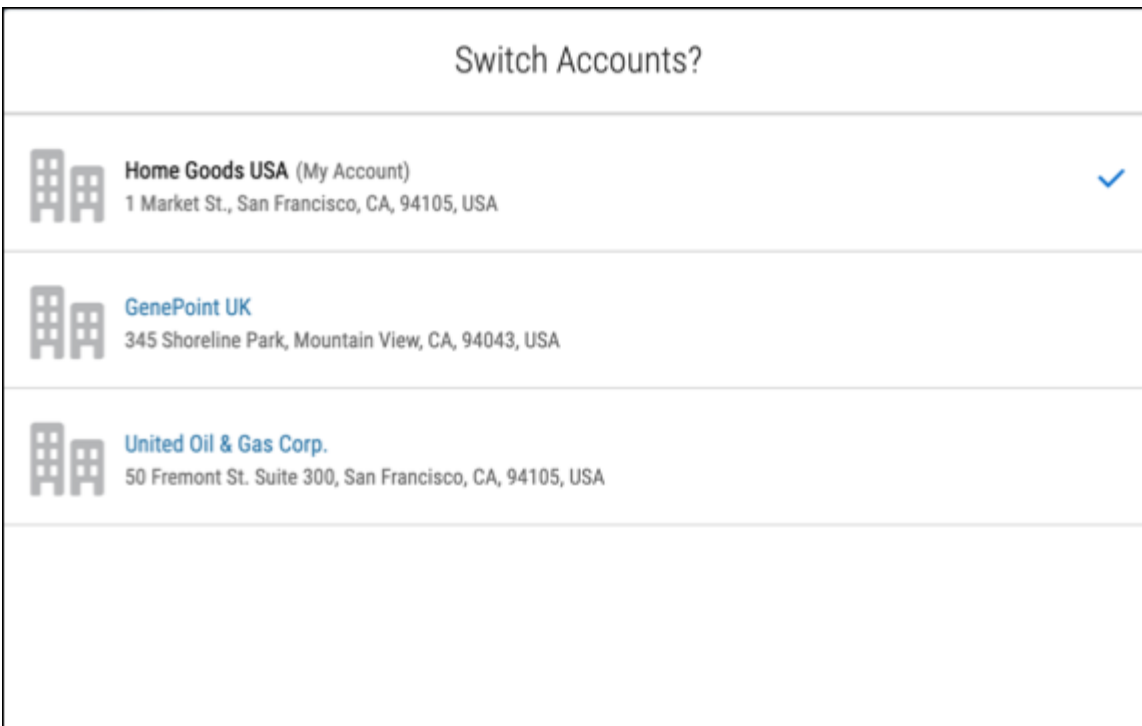
Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce

- d. Save your changes.
3. Add the Account Switcher option to the user profile menu in the store.
 - a. In Experience Builder, click the user profile menu.
 - b. Under Authenticated User Options, select **Edit Default User Profile Menu**.
 - c. If the Account Switcher menu item is already added, skip to step g. Otherwise, click **+ Add Menu Item**.
 - d. In the Type field, select **Modal**.
For older stores built on the Aura platform, select **Event**.
 - e. In the Event field, select **Account Switcher**.
 - f. Enter a name for the menu item, for example, `Switch Accounts`.
 - g. Click **Save Menu**.

When the buyer logs into the store, they can select the Switch Accounts option from the user profile menu and choose an external account.



You can use `{!CurrentUser.effectiveAccountId}` as the Account Id attribute value in components that track account IDs. This value updates the data that's displayed in the component to the account that's being switched to. For example, the Related Record list component shows the Members list on the Account Management page and uses `{!CurrentUser.effectiveAccountId}` in the Parent Record Id field by default. When the user who is managing the target account switches to the target account, the information on the Account Management page switches to the context of the target account. The managing user can manage target account members from there.

To implement behavior based on account switching, you can create a custom component and use the account ID `{!CurrentUser.effectiveAccountId}`.


SEE ALSO:

- [Use a Business Account to Create Buyers for B2B Stores](#)
- [Customize the Profile Menu](#)

Mass Enable Accounts as Buyer Accounts

Use any tool or mechanism that can create data inside of Salesforce—for example, Data Loader, Flow Builder, or the sObject API—to enable accounts as buyer accounts.

Create Buyer Account records and set two fields: `BuyerId` and `IsActive`.

 **Note:** Don't put automation on the `IsBuyer` checkbox on Account. Instead place your automation on creation of a Buyer Account.

1. Set the value of the `BuyerId` field to the Account Record Id of the Account that you want to enable as a buyer.
2. Set `IsActive` to `TRUE`.

Manage Guest Access

A guest is someone who isn't logged in to your store as an authenticated customer. Depending on the level of access that you provide, you can let guests browse your store, add products to their cart, and place orders.

[Enable Guest Access to a Store](#)

Guest access lets unauthenticated customers browse your store and make purchases. Your products are also discoverable online to anyone. For B2C stores, guest access is required for shoppers to access the store. For B2B stores, guest access is optional.

[Disable Guest Access to a Store](#)

Disable guest access to prevent unauthenticated guests from browsing your store and seeing your catalog and products.

Enable Guest Access to a Store

Guest access lets unauthenticated customers browse your store and make purchases. Your products are also discoverable online to anyone. For B2C stores, guest access is required for shoppers to access the store. For B2B stores, guest access is optional.

Person accounts must be enabled before you can enable guest access. See [Enable Person Accounts for Commerce](#).

1. On your store's home page, click **Administration**.
2. Click **Buyer Access**.
3. Under Guest Access, click **Enable**.

If guest access is partially or fully configured, the button is labeled Disable. To reconfigure guest access settings, click **Disable** and then click **Enable** in these scenarios:

- If guest access settings aren't set up the way you prefer.
- If you associated the store to a site after enabling guest access. This scenario occurs if the store is created through the Order on Behalf Of process or if the store is created programmatically, and not through the Commerce app.

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Available in: B2B Commerce and D2C Commerce

- If you want to ensure guest access is set up correctly.

Reconfiguring guest access overwrites your existing settings.

The system creates a guest buyer profile and turns on cart and checkout access for the profile. By default, the guest cart expires after 168 hours.

If the store is associated with a site, the system also completes these steps.

- Assigns a market to the store and shows the name on the screen.

If you've set up guest access for a store created before Spring '24 and assigned a buyer group for guest access, the screen shows the buyer group instead of a market.

- In Experience Builder, sets public access to **Guest users can see and interact with the site without logging in**.
- In Digital Experiences, sets the preferences for the store to **Allow guest users to access public APIs**. Record ownership is assigned to the Salesforce Admin profile.
- Sets Read access for these objects: Catalogs, Categories, Documents, Electronic Media Groups, Locations, Products, Product Category Products, Stores, and Store Catalogs.

4. Enable **Preserve Guest Cart**.

In stores created in Spring '24 or later, this setting is enabled by default. Preserve Guest Cart lets a guest log in as an authenticated user without emptying their cart. The cart contents and coupons are transferred from the guest cart to an authorized cart. Delivery and tax calculation details aren't saved.

5. Update the Field Level Security settings for the Product and Product Attribute fields that you want guests to be able to search.

- a. From Setup, in the Quick Find box, enter *Digital Experiences*, and select **All Sites**.
- b. Next to the name of your store, click **Builder**.
- c. To access settings, click the gear icon and under Guest User Profile, click the profile name link.
- d. Scroll down to Field Level Security, click **Product [View]**, and click **Edit**. For all fields that you want guest users to be able to search, select Read access, and then click **Save**.
- e. If you're using product variations, under Field Level Security, click **Product Attribute [View]**, and click **Edit**. For all fields that you want guest users to be able to search, select Read access, and then click **Save**.

6. Add entitlements and price books to the market.

See [Configure a Market for Your Commerce Store](#).

7. Rebuild the search engine to include products that guest customers are entitled to. See [Rebuild the Commerce Search Index](#).

8. To make sure that you've provided the correct level of access, preview your store as a guest.

Some settings can take a few minutes to take effect.

SEE ALSO:

[Disable Guest Access to a Store](#)

[Configure Self-Registration for B2C Stores](#)

[Order on Behalf Of a Customer](#)

Disable Guest Access to a Store

Disable guest access to prevent unauthenticated guests from browsing your store and seeing your catalog and products.

1. On your store's home page, click **Administration**.
2. Click **Buyer Access**.
3. Under Guest Access, click **Disable**.
This action also unassigns buyer groups from the guest buyer profile.

SEE ALSO:

[Enable Guest Access to a Store](#)

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Available in: Lightning Experience and Salesforce mobile app

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Available in: B2B Commerce and D2C Commerce

Products and Pricing

After you create your store, you can set up your products and pricing.

[Catalogs for a Store](#)

A store must have only one catalog that represents the entire collection of products offered through your store. To make it easier for shoppers and buyers to find products, you can group them into categories.

[Product Categories](#)

Grouping products into categories makes it easier for shoppers to find products.

[Products](#)

When you add products to your store, make them easy to find, and enrich them with images and translations.

[Product Sets](#)

A product set is a collection of related products. The parent product is grouped with the related child products. The child products are shown together on the product detail page (PDP), but each child is priced separately. A shopper can add all the products to the cart in a single operation or selectively add individual child products.

[Pricing for Commerce Stores](#)

To set up pricing in your store, configure a standard price book along with custom price books for your store and buyer groups. You can also configure the strikethrough price book that highlights reduced pricing for customers. All products must have an entry in the standard price book before you can add them to other price books. When you create a store, a default price book and default strikethrough price book are assigned to the store.

Catalogs for a Store

A store must have only one catalog that represents the entire collection of products offered through your store. To make it easier for shoppers and buyers to find products, you can group them into categories.

[Create a Catalog and Assign It to a Store](#)

Before you can make products available to buyers and shoppers, your store must have a catalog. A catalog is the entire collection of products that you offer through your store. When you create a store, a default catalog is assigned to the store. You can use the default catalog or assign a different catalog to the store. You can assign a catalog to more than one store, but a store can have only one catalog at a time.

[Verify That a Catalog Is Assigned to the Store](#)

Your store must have an associated catalog.

[Product Readiness](#)

Improve your customers' shopping experience with a comprehensive, consistent level of detail for all products on your storefront. Use Product Readiness to find any products that are missing important elements that can make the product difficult for a customer to understand and purchase. Ensure that all the products in a catalog are storefront ready before you set the catalog to live.

[Enable Product Readiness](#)

Before merchandisers can run Product Readiness on a catalog, someone with administrative privileges must enable the feature. After the feature is enabled, and anytime a custom rule set is enabled or disabled, build an initial score for your catalogs.

[Prepare Your Catalog with Product Readiness](#)

Before activating your catalog, run Product Readiness. After checking all products in the catalog against the default rule set, Product Readiness displays which products still need some attention.

Create a Catalog and Assign It to a Store

Before you can make products available to buyers and shoppers, your store must have a catalog. A catalog is the entire collection of products that you offer through your store. When you create a store, a default catalog is assigned to the store. You can use the default catalog or assign a different catalog to the store. You can assign a catalog to more than one store, but a store can have only one catalog at a time.

1. From the Commerce App navigation menu, select **Catalogs**.
2. Click **New**.
3. Enter a name for your catalog, and click **Save**.
4. To assign the catalog to a store, on the catalog's Stores tab, click **Assign Store**.
5. Search for and select a store.
6. Click **Save**.

SEE ALSO:

[Plan Your Category Structure](#)

Verify That a Catalog Is Assigned to the Store

Your store must have an associated catalog.

1. From the Commerce App Navigation menu, select **Catalogs**.
2. Click the catalog that you want to check.
3. On the catalog's detail page, click the **Stores** tab.
 - If your store is listed, the catalog is assigned to that store.
 - If your store isn't listed, assign the catalog to your store.

SEE ALSO:

[Create a Catalog and Assign It to a Store](#)

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited,** and **Developer Editions**

Available in: B2B Commerce and D2C Commerce

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Product Readiness

Improve your customers' shopping experience with a comprehensive, consistent level of detail for all products on your storefront. Use Product Readiness to find any products that are missing important elements that can make the product difficult for a customer to understand and purchase. Ensure that all the products in a catalog are storefront ready before you set the catalog to live.

When you run readiness on a catalog, all the products in that catalog are compared to a set of default rules, which act as criteria for ready products.

- At least one list image
- At least one detail image
- A description
- A SKU
- At least one category

Product Readiness can also recommend categories for your products. To see these recommendations in the Product Readiness details, enable Category Recommendations when configuring Product Readiness.

These rules are part of the default rule set that we provide. You can't add, remove, or edit rules in the default rule set. To change the criteria for readiness, create a custom set of rules to use instead.

SEE ALSO:

[Enable Product Readiness](#)

[Prepare Your Catalog with Product Readiness](#)

[Custom Rules for Product Readiness](#)

Enable Product Readiness

Before merchandisers can run Product Readiness on a catalog, someone with administrative privileges must enable the feature. After the feature is enabled, and anytime a custom rule set is enabled or disabled, build an initial score for your catalogs.

1. Navigate to a product workspace.
2. Under the Product Workspace menu, select **Commerce Setup**.
3. Under Product Readiness on the left panel, select **Product Readiness**.
4. Enable Product Readiness.
5. To get category recommendations for products, enable **Category Recommendations**.
6. Click **Rebuild Score**.
Rebuild the score whenever implementing a new custom rule set.

SEE ALSO:

[Prepare Your Catalog with Product Readiness](#)

[Product Readiness](#)

[Custom Rules for Product Readiness](#)

Prepare Your Catalog with Product Readiness

Before activating your catalog, run Product Readiness. After checking all products in the catalog against the default rule set, Product Readiness displays which products still need some attention.

1. Navigate to a product workspace.
2. Select a catalog.
3. Click **Check Readiness**.
A readiness column appears with scores for each product. Products with a check mark are ready to go. Products with a partially filled circle don't fit all the requirements for readiness.
4. To address a product that doesn't fit the criteria of ready, click the circle in the Score column.
The Readiness Details panel opens.
5. Go to the product's page to address the missing criteria for each product.
6. After you update your products, check readiness again to ensure that all products are ready.
7. To activate ready products in bulk, filter the list view to show only products with the Active column equal to false. Select the check box for all products with a check mark in the Score column and click **Activate**.
8. Click **Done**.

SEE ALSO:

[Product Readiness](#)

[Custom Rules for Product Readiness](#)

[Create a Catalog and Assign It to a Store](#)

Product Categories

Grouping products into categories makes it easier for shoppers to find products.

[Plan Your Category Structure](#)

Categories make products easier to discover in searches and through navigation. Build a category structure that shows product relationships and makes products easier to find. When you create a store, a default catalog with one Products category is assigned to the store.

[Create Product Categories and Subcategories](#)

Categories make products easier to discover in searches and through navigation. Design your category structure first, and then create it.

Plan Your Category Structure

Categories make products easier to discover in searches and through navigation. Build a category structure that shows product relationships and makes products easier to find. When you create a store, a default catalog with one Products category is assigned to the store.

Build your category structure using these elements:

- Categories
- Filters
- Values

Map out your structure before you create it. Keep it as simple as possible without sacrificing product discoverability.

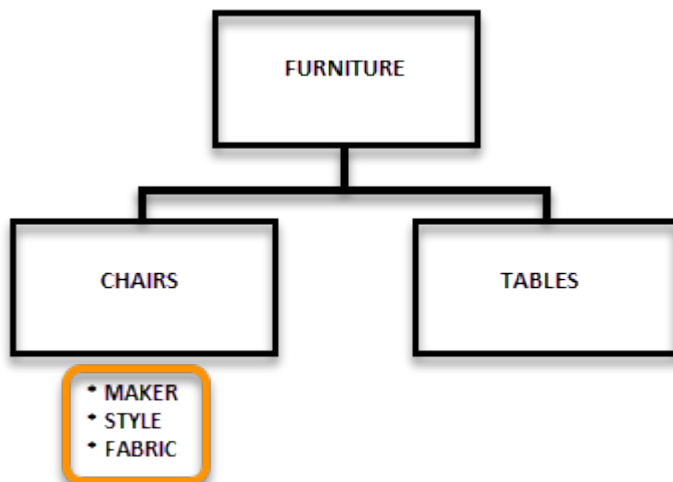
Categories

A category represents the top-level classification of your products or services, for example, furniture, tools, and garden. You can create up to five levels of categories and subcategories. When you create a category, you can choose whether to include it in menus and in which order it appears on the navigation menu and in filters.

You can assign a product to more than one category. For example, a buyer who navigates your store can find chairs and tables under both Furniture and Garden.

Filters

A filter represents an attribute of a product in the category. For example, the chairs subcategory has filters for maker, style, and fabric. A filter is derived from the fields on a product record. You choose which product fields act as filters.



Values

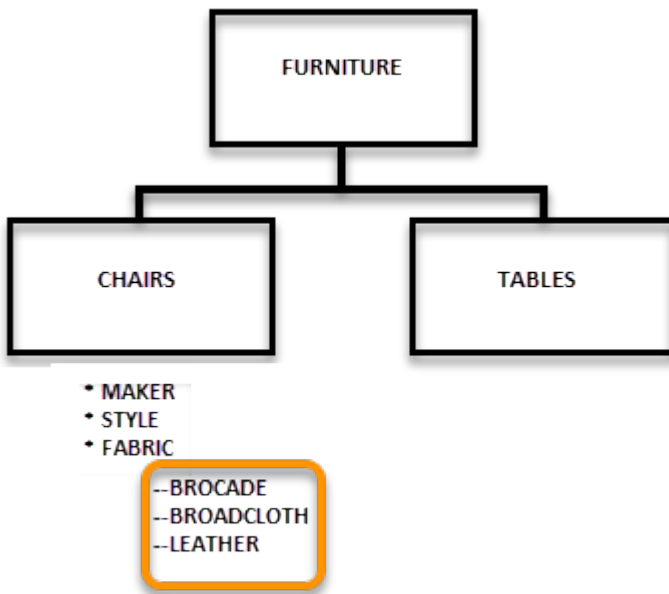
A value describes a filter's available options. For example, the chair fabric options include brocade, broadcloth, and leather. A value is derived from the fields on a product record. If a filter has values, the values appear under the parent filter on the results page.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce



SEE ALSO:

[Create Product Categories and Subcategories](#)

Create Product Categories and Subcategories

Categories make products easier to discover in searches and through navigation. Design your category structure first, and then create it.

For information about designing a category structure, see [Plan Your Category Structure](#) on page 68.

1. From the Commerce App Navigation menu, select **Catalogs**.
2. Select a catalog.
3. On the Categories tab, click **Create Category**.
4. Enter a name for the category, and optionally enter a description
5. If you're adding a subcategory, search for and select its parent category.
6. If you want this category to appear in a menu, select **Show In Menu**.

Rebuild your search index for any category changes to take effect.

7. Assign a sort order to the category or subcategory.

The sort order determines the order in which a category or subcategory appears on the navigation menu and in filters. Let's say you have three categories, Paint, Brushes, and Accessories, and you assign them 1, 2, and 3, respectively. Across the Multilevel Navigation Menu, Paint is listed first, Brushes second, and Accessories third. On results pages, the same order is used for results filters.

8. Click **Save**, or click **Save & New** to continue creating categories.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

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Available in: B2B Commerce and D2C Commerce

Products

When you add products to your store, make them easy to find, and enrich them with images and translations.

[Add Products](#)

In addition to bulk loading products using a CSV file, you can add products one at a time.

[Enhance Product Descriptions with Einstein](#)

Generate product descriptions using Einstein Generative AI. Einstein uses your instructions to generate revised product descriptions for the selected product in your B2B or B2C store. Product descriptions support instructions in English only. You can generate descriptions in all languages in your B2B or B2C store. Then review the generated description and accept or reject the changes. You need the Einstein Generative AI license to use Einstein Generative AI. Contact your account executive for more information.

[Enhance Product Fields with Einstein](#)

Generate product text fields for multiple products in one process using Einstein Generative AI. Einstein uses your instructions and any linked reference fields to generate revised product text for the selected products. Product fields support instructions in English only. You can generate product text fields in languages in your B2B or B2C store. Then review the generated text and accept or reject the changes. You need the Einstein Generative AI license to use Einstein Generative AI. Contact your account executive for more information.

[Product Image Types](#)

You can view images as an alternate view of a product on the Product Detail page, as a product list image in searches, carts and category views, as a banner to promote a product or category, as a tile for a quick view, and as attachments for detailed information on a product or category.

[Add Media to Products and Categories](#)

To provide more information about your products and categories, add images and attachments. Images and attachments are pulled from a CMS workspace. You can associate media to parent and variation products.

[Add Products to Categories](#)

Add a product to a category to make it available in a store. You can also add multiple products at once. The maximum number of products in a category is 100,000.

[Choose Product Categories to Use in Breadcrumbs](#)

The order of breadcrumbs is determined by a combination of a category and product and the date and time that their association was established. The first category that a product is associated with is the product's primary category and becomes the basis of the breadcrumb order. You can customize the default order of breadcrumbs by explicitly identifying categories as primary. When you identify a category as primary, your store uses it to construct the category path that populates the breadcrumbs on the Product Detail page. You can associate a product with multiple categories, but it can have only one primary category.

[Purchase Quantity Rules for a B2B Store](#)

Use rules to control the amount of a product that a customer can buy.

[Product Variations and Attributes](#)

Use variations to extend the range of products that you offer. For example, add size and color options to a tee shirt. Configure variations to be searchable in your stores and available in multiple languages.

[Product Variation Grouping](#)

When you show product search results, you have the option of returning all variation products (the children) or only one (the parent). When all results are shown, no grouping is present. When one result is shown, buyers click that result to see all the parent product's variations.

Entitlement Policies

Entitlement policies are simple entities that bring together buyer groups and products. They define which products a buyer group can see and if the group can also see product prices. When you create a store, a default buyer group is added to a default entitlement policy. B2B stores support multiple entitlement policies. B2C stores support only one entitlement policy.

Add Products

In addition to bulk loading products using a CSV file, you can add products one at a time.

These steps describe how to add a product using a workflow that consolidates the information required for the product all on one screen. To add a basic product record, click **New** from the dropdown menu.

1. From the Commerce App Navigation menu, select **Product Workspace**.
2. Click **Add**.
3. Complete the product details fields.
 - a. Enter a product name.
 - b. (Optional) Select the product family that this product belongs to.
Use product families to group products together. You can group products in any way that you want. You can use product family values as filters for search results.
 - c. Enter a product SKU.
The stock-keeping unit (SKU) is the unique identifier for a product. The SKU is required for placing orders.
 - d. To make the product available in your store, select **Active**.
To make a product discoverable in a search, after you create the product, mark the product as searchable.
 - e. Enter a product code.
 - f. Enter a product description.
4. Complete the pricing fields.
 - a. Select a currency from the dropdown. B2C stores support multiple currencies.
 - b. Select a price book.
 - c. Enter the price for the product.
5. Complete the organization and visibility fields.
 - a. Select up to three categories for the product.
If you select more than one category after you create the product, identify which category is primary. In the Product Workspace, select the product. In the Categories related list, select the primary category. Stores use the primary category to construct paths for breadcrumbs on the Product Detail page.
 - b. Select up to 10 buyer groups for the product.
6. To add images or attachments to the product, complete the media fields.
You select images and attachments from a CMS workspace. If the image or attachment isn't in a CMS workspace, you can add it to a workspace during the assignment process.
 - a. On the Images tab, click **Add** to include a list image and up to eight product detail images.
 - b. On the Attachments tab, click **Add** to include up to five attachments.

EDITIONS

Available in: Lightning Experience and the Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

7. Click **Save**, or to continue adding products, click **Save & Add**.

SEE ALSO:

- [Choose Product Categories to Use in Breadcrumbs](#)
- [Import and Export Commerce Data](#)

Enhance Product Descriptions with Einstein

Generate product descriptions using Einstein Generative AI. Einstein uses your instructions to generate revised product descriptions for the selected product in your B2B or B2C store. Product descriptions support instructions in English only. You can generate descriptions in all languages in your B2B or B2C store. Then review the generated description and accept or reject the changes. You need the Einstein Generative AI license to use Einstein Generative AI. Contact your account executive for more information.

This tool uses generative AI, which is known to include inaccurate or harmful responses. Before using externally, review the output for accuracy and safety. You assume responsibility for the output when making business decisions.

1. Turn on Einstein generative AI in Setup.
2. From the Commerce App Navigation menu, select Product Workspace, and then select a product. From the right side of the Product record page, the current product description is provided in the Current field of the Einstein GPT Recommendations panel.
3. Add a product description if one is missing. Default sample text appears.
4. From the Instructions field, add instructions or descriptive information. For example, target a specific audience or provide additional details on the product and its benefits (English only). To change the default instruction text, from the Setup icon, select Edit Page and enter a new default instruction for the Einstein GPT Recommendations component.
5. Select **Translate to all languages** if data translations are set up for your organization.
6. To view the newly crafted product description in the Recommendation field, click **Create**. You can edit the text, accept it, or click **Create** to get a new suggestion.
7. To save the generated recommendation, click **Apply**. When you return to the Product Workspace, the product contains the newly accepted description.

This change applies to Lightning Experience in the Unlimited edition with Commerce Einstein and the Einstein Generative AI for Commerce add-on. Einstein is available in Lightning Experience.

Einstein Generative AI for Commerce charges only for the activity you use. Learn how Commerce Cloud tracks your usage against your subscription allowance. For each Einstein feature, credit usage depends on the size of the request and the response from Einstein.

For Einstein product fields:

- The request size and response depends on the character length of the product field
- A request is sent for each selected product record

EDITIONS

Available in: Lightning Experience and the Salesforce mobile app

Available in: **Unlimited** Edition

Available in: B2B Commerce and D2C Commerce

To learn more or get updates on your Commerce credit usage, contact your Salesforce account executive.

SEE ALSO:

[Manage Products in the Product Workspace](#)


[Einstein Generative AI Solutions](#)

[Einstein Generative AI](#)

[Enable Data Translation](#)

Enhance Product Fields with Einstein

Generate product text fields for multiple products in one process using Einstein Generative AI. Einstein uses your instructions and any linked reference fields to generate revised product text for the selected products. Product fields support instructions in English only. You can generate product text fields in languages in your B2B or B2C store. Then review the generated text and accept or reject the changes. You need the Einstein Generative AI license to use Einstein Generative AI. Contact your account executive for more information.

 **Note:** This tool uses generative AI, which is known to include inaccurate or harmful responses. Before using externally, review the output for accuracy and safety. You assume responsibility for the output when making business decisions.

These steps describe how to use Einstein to enhance your products' text fields in a single step.

1. Turn on Einstein generative AI in Setup.
2. From the Product Workspace, select one or more products.
3. Click **Create and Review Field Text**.
4. From the Create and Review Field Text page, complete the Einstein fields and instructions.
 - a. Select a product field from the dropdown.
The dropdown includes all product text fields or custom text fields (of type 'text area'). If you change the default field from Product Description to something else, be sure to update the instructions. You can only generate one field type at a time.
 - b. (Optional) Select whether you want text generated for all languages or just your default language.
 - c. (Optional) Select whether you want to create customer instructions for each language or use the same instructions for all languages.
These two language options only appear if you've enabled data translation.
 - d. Enter the instructions for Einstein generative AI.
For example you could enter something like, 'Rewrite the product descriptions to be more appealing to small businesses. Product fields generated with Einstein support instructions in English only. Confirm the accuracy of any non-English generated recommendations.'
 - e. (Optional) Enter reference data fields you want considered during the generation.
Reference fields are included in the product record.
5. Click **Create All**.
An alert notifies you that your descriptions are being created for the selected products.
6. You can click **Close** to exit this page. The generation continues to process.
7. To view your results, click **Refresh** in the Product Workspace. You can either click Refresh periodically to wait for their descriptions to be generated, or exit the page and wait for the notification.

EDITIONS

Available in: Lightning Experience and the Salesforce mobile app

Available in: **Unlimited** Edition

Available in: B2B Commerce and D2C Commerce

If the field text couldn't be created, you're notified to retry.

8. From the Product Workspace, review the content created for the products.
9. Select the language from the dropdown to review the text in a specific language.
10. To revise the suggested text, modify the instructions for Einstein and regenerate.
11. If satisfied with the suggested text, select those products and then click **Accept**.
12. After accepting the content you want applied, you can create field text for the remaining products or reject the text.
 - a. To create field text for the remaining products, select the products, revise the instructions for Einstein, and click **Create All**. Einstein regenerates the descriptions.
 - b. To reject all or selected generated field text, select the products and then click **Reject**. The description reverts to the pre-generated text.
Resolve all suggested text before generating text for new products.
13. Click **Close** when complete.
Results are stored for seven days.

This change applies to Lightning Experience in Unlimited editions with Commerce Einstein and the Einstein generative AI for Commerce add-on. Einstein is available in Lightning Experience.

Einstein Generative AI for Commerce charges only for the activity you use. Learn how Commerce Cloud tracks your usage against your subscription allowance. For each Einstein feature, credit usage depends on the size of the request and the response from Einstein.

For Einstein product fields:

- The request size and response depends on the character length of the product field.
- A request is sent for each selected product record.

To learn more or get updates on your Commerce credit usage, contact your Salesforce account executive.

SEE ALSO:

- [Manage Products in the Product Workspace](#)
- [Einstein Generative AI Solutions](#)
- [Einstein Generative AI](#)
- [Enable Data Translation](#)

Product Image Types

You can view images as an alternate view of a product on the Product Detail page, as a product list image in searches, carts and category views, as a banner to promote a product or category, as a tile for a quick view, and as attachments for detailed information on a product or category.

You can view different types of images in your store.

- **Product Detail Images**—A product detail image provides an alternate view of a product on the product detail page. You can add up to nine images of a product, and you can sort the images to change the order in which they're displayed. The optimal size for a product detail image is 400x400 pixels.
- **Product List Image**—The product list image appears in searches, carts, and category views. One product list image can be added to a product at a time. The optimal size for a product list image is 400x400 pixels.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer Editions**

Available in: B2B Commerce and D2C Commerce

- **Banner Image**—Banner images span the width of a page. They're often used to enhance the rich content on a page or to promote a specific product or category. The optimal size for a banner image is 1150x200 pixels.
- **Tile image**—Use a tile image to provide a quick view of your product or category. You can add one tile image to a product or category. For best results, use an image that's as close to square as possible. The optimal size for a tile image is 500x500 pixels. An image that isn't square is scaled to fit, but doesn't display optimally. In an extreme case, an image that's tall with a small width is scaled to fit the display area and appears as a vertical line.
- **Attachments**—Attachments can provide detailed information or specifications about a product or category. Attachments appear with product detail images. They help give customers a complete description of the product.

SEE ALSO:

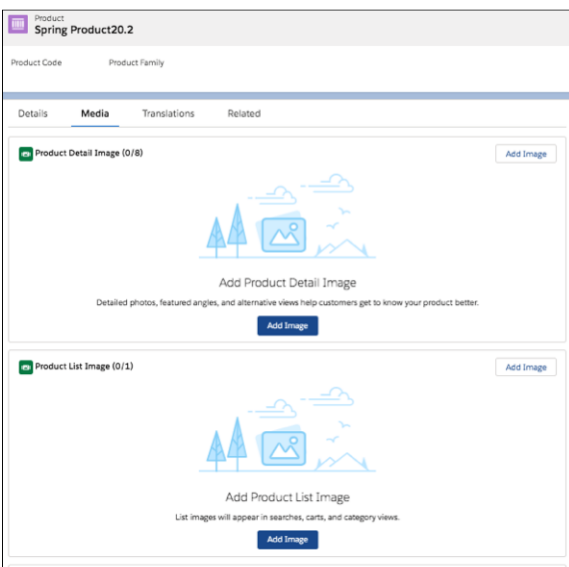
[Add Media to Products and Categories](#)

Add Media to Products and Categories

To provide more information about your products and categories, add images and attachments. Images and attachments are pulled from a CMS workspace. You can associate media to parent and variation products.

To display an external source on the product detail page, the URL must be added to the CSP Trusted Sites list.

1. From the Commerce App navigation menu, select **Product Workspace** or **Catalogs**.
2. Select a product from the product workspace, or select a Catalog and then select a category.
3. On the Media tab, click **Add Image**.















4. Select the items that you want to add from the Content Selector page.

EDITIONS

Available in: **Lightning Experience** and **Salesforce mobile app**

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: **B2B Commerce and D2C Commerce**

Content Selector			
Spring Catalog 2020 ▾			
25 item(s)			
Search this list...			
<input type="checkbox"/>	Title ▾	Created by ▾	Last Modified ▾
<input type="checkbox"/>	 Yogi master	Manager 4	3/27/2020, 4:26 PM
<input type="checkbox"/>	 upload test	Storefront Manager	3/27/2020, 4:24 PM
<input type="checkbox"/>	 Title fun	Manager 4	3/27/2020, 4:22 PM
<input type="checkbox"/>	 With background	Storefront Manager	3/27/2020, 3:57 PM
<input type="checkbox"/>	 Against white background	Storefront Manager	3/27/2020, 3:38 PM
<input type="checkbox"/>	 Greens-til2	Manager 4	3/25/2020, 3:36 PM
<input type="checkbox"/>	 Indoor greens	Manager 4	3/25/2020, 3:35 PM
<input type="checkbox"/>	 Test-results	Manager 4	3/25/2020, 3:34 PM
<input type="checkbox"/>	 Greens	Manager 4	3/25/2020, 3:29 PM
<input type="checkbox"/>	 Timberland	Manager 5	3/25/2020, 2:16 PM
<input type="checkbox"/>	 Dining Chair	Manager 4	3/25/2020, 2:16 PM
<input type="checkbox"/>	 Leather boots	Manager 5	3/25/2020, 2:16 PM

5. Click **Save**.

Stores based on the LWR platform created in orgs provisioned with Commerce in Summer '23 or later have a public channel to an enhanced CMS workspace. To allow those stores to also access media stored in a non-enhanced workspace, add the store's public channel to the non-enhanced workspace. See [Add a Channel to a CMS Workspace](#).

SEE ALSO:

[Product Image Types](#)

Add Products to Categories

Add a product to a category to make it available in a store. You can also add multiple products at once. The maximum number of products in a category is 100,000.

1. From the Commerce App Navigation menu, select **Product Workspace**.
2. Select the products to assign to a category.
3. Open the action menu next to Import and Click **Add to Category**.
4. Select one or more categories and click **Save**.

SEE ALSO:

[Manage Products in the Product Workspace](#)

EDITIONS

Available in: Lightning Experience and Salesforce mobile app


Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Choose Product Categories to Use in Breadcrumbs

The order of breadcrumbs is determined by a combination of a category and product and the date and time that their association was established. The first category that a product is associated with is the product's primary category and becomes the basis of the breadcrumb order. You can customize the default order of breadcrumbs by explicitly identifying categories as primary. When you identify a category as primary, your store uses it to construct the category path that populates the breadcrumbs on the Product Detail page. You can associate a product with multiple categories, but it can have only one primary category.

When a product is associated with just one category, you don't need to explicitly mark the category as primary. By default, that single category is the product's primary category. However, when a product is associated with multiple categories, a primary category can be useful. For example, let's say that your store offers a table saw that's associated with the Power Tools category. This association is reflected in the breadcrumb on the Product Detail page. You're having a sale, so you associate the tool with a Sale category. To have the Sale category appear in the breadcrumb on the tool's Product Detail page, mark Sale as the tool's primary category.

 **Note:** Before you can mark a product category as primary, your admin must set up the layout on the Product object to include the Category related list.

1. From the Commerce App navigation menu, select **Stores**.
2. Select a store.
3. On the store landing page, click **Product**.
4. Click a product to open its detail page.
5. Open the **Related** tab.
6. In the Categories section, open a product's row actions menu and select **Set as Primary Category**.

 **Tip:** On the Related tab, you can also select **Edit** from a product's row actions menu, and select **Is Primary Category**.

Keep these behaviors in mind when working with breadcrumbs.

- If a category isn't included in navigation—that is, **Show in Menu** isn't selected—it doesn't appear in the breadcrumb, even if it's marked as primary. Instead, Home is used in the breadcrumb. Also, if the product has only one associated category, and that category is non-navigational, the breadcrumb displays Home.
- If you delete a primary category and that category is the only one assigned to a product, the product becomes unavailable in store navigation. If multiple categories are associated with the product, the oldest product-category association determines which category is primary.
- If you make a primary category inactive, all products that are associated with only that category become unavailable in store navigation. If multiple categories are associated with the product, the oldest product-category association determines which category is primary.
- If you remove a product from the primary category, the product's next category, based on the assigned date, becomes the new primary. If the product doesn't have other categories, it becomes unavailable in store navigation.

SEE ALSO:

[Configure Default Store Navigation](#)

Purchase Quantity Rules for a B2B Store

Use rules to control the amount of a product that a customer can buy.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

Purchase Quantity Rules for a B2B Store

A purchase quantity rule defines the minimum and maximum amounts of a product that a customer can buy and the number of products that are added with each increase. You can assign one purchase quantity rule to each simple product and product variation. In the rule, the minimum and maximum quantities must be multiples of the increment. For example, minimum 3, maximum 300, increment 3. You can define quantity amounts as whole numbers or as fractions up to four decimal places.

Enable Purchase Quantity Rules for a B2B Store

To make purchase quantity rules available, add the Quantity Rule related list to the Product object's page layout.

Create a Purchase Quantity Rule for a B2B Store

You can define the minimum and maximum amounts of a product that a customer can buy and the number of products to add with each increase. You can assign a quantity rule to simple products and product variations. Because parent products aren't sold, they don't need quantity rules.

Purchase Quantity Rules for a B2B Store

A purchase quantity rule defines the minimum and maximum amounts of a product that a customer can buy and the number of products that are added with each increase. You can assign one purchase quantity rule to each simple product and product variation. In the rule, the minimum and maximum quantities must be multiples of the increment. For example, minimum 3, maximum 300, increment 3. You can define quantity amounts as whole numbers or as fractions up to four decimal places.

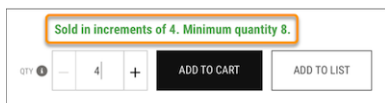
Assign a purchase quantity rule only to the product that it applies to. For example, let's say you sell two kinds of espresso machines. One is for businesses to put in visitor areas and staff kitchens. Customers can buy as many as they like in any increment, so a quantity rule isn't needed.

The other machine is industrial and sold to commercial customers, like coffee shop chains. For this machine, you receive a volume discount from your distributor. To pass that savings to buyers, you can establish a minimum purchase rule and an increment rule to keep the volume within your distributor's parameters. For example, you can have a five-machine minimum, with a required increment of five with each addition. So your customer can buy 5, 10, 15 machines, and so on.

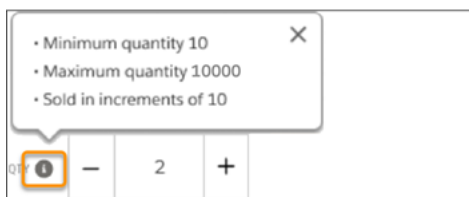
You can also control the maximum number for purchase. For instance, you want to ensure that you have enough stock to satisfy all your customers. Or, you want to keep a ceiling on shipping costs. So you limit the number of machines per customer to prevent anyone from cornering the market or to stay under your shipping ceiling.

You can set purchase quantity rules in a few places.

- Enable quantity rules through the [Object Manager](#).
- Define values for your rules and assign rules to simple products and product variations in the [Product Workspace](#).
- Add display text for quantity rules using the Quantity Selector properties in Experience Builder components.



The rule text that you specify appears when buyers click the information icon on the quantity selector.



EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce

Cart Items, Product Detail Purchase Options, Quantity Selector, and Results Layout are components that have properties related to quantity rules. Use the properties to enter display text for the quantity rule and to show or hide quantity rules in the store. The components also show the minimum, increment, and maximum in whole numbers and fractional quantities. You can view or edit the quantity field with up to two decimal places only on the Order pages. Any other pages that reference these quantity fields also reflect only two decimal places.

Enable Purchase Quantity Rules for a B2B Store

To make purchase quantity rules available, add the Quantity Rule related list to the Product object's page layout.

1. From the object management settings, go to Page Layouts to enable quantity rules for a product.
2. Select **Product Layout**.
3. Select **Related Lists**, and drag the **Quantity Rules** related list to the Related Lists section.
4. Save your changes.

After you enable purchase quantity rules, [create and assign](#) them to simple products and product variations.

Create a Purchase Quantity Rule for a B2B Store

You can define the minimum and maximum amounts of a product that a customer can buy and the number of products to add with each increase. You can assign a quantity rule to simple products and product variations. Because parent products aren't sold, they don't need quantity rules.

When creating a purchase quantity rule:

1. From the Commerce App navigation menu, select **Product Workspace**.
2. Select a simple product or a product variation, and click its **Related** tab.
3. Next to Quantity Rules, click **Assign**.
4. Click in the **Quantity Rule** field, and select **New Quantity Rule**.
5. Enter the amounts. The minimum and maximum quantities must be multiples of the increment. For example, minimum 4, maximum 400, increment 2.
 - Minimum—The lowest quantity that a customer can buy.
 - Increment—The fixed number of items that are added to the selection when the customer adds more of the same product.
 - Maximum—The highest quantity that a customer can buy.

You can define the quantity amounts as whole numbers up to one hundred million or, for B2B stores only, as fractions up to four decimal places. For example, for fractional quantities, you can add a minimum of 1.500, a maximum of 1000.5000, or an increment of 1.5000.

Fractional quantities are visible when a buyer searches for a product, views the product's details, and adds the quantity to the cart. Fractional quantities are available only with B2B store.

6. Name the quantity rule, and save your work.
7. To activate the rule, click in the **Quantity Rule** field, select the rule, and click **Assign**.

The Cart Items, Product Detail Purchase Options, Quantity Selector, and Results Layout components have properties related to quantity rules. Use the properties to enter display text for the quantity rule.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce

Product Variations and Attributes

Use variations to extend the range of products that you offer. For example, add size and color options to a tee shirt. Configure variations to be searchable in your stores and available in multiple languages.

[Add Product Variations and Attributes with Guided Setup](#)

The guided setup walks you through creating attributes and assigning them to variations with clear step-by-step instructions and navigable links. It also helps you configure search and localization.

[Product Classes, Variations, and Attributes](#)

A product class determines whether a product is sold individually or can contain variations. Different product classes support different subsets of product elements, such as stock keeping units (SKU) and attribute sets. Product variations let merchants offer various options for a product. Each product variation, also called an attribute, represents a variation of the parent product. Each variation has its own SKU. You can track each SKU as a unique product record. You can group attributes into an attribute set and assign the set to a product.

[Create Attributes for Product Variations](#)

When you create attributes, you identify the features that describe individual product variations. Rather than assign individual attributes to a parent, you group the attributes into an attribute set, which you then associate with one or more products.

[Add an Attribute Set to a Product](#)

You can add an attribute set to one or more products, but you can associate a product with only one attribute set.

[Make Product Variations and Variation Attributes Searchable](#)

Set up Search for product variations and variation attributes so that they're discoverable in your store.

Add Product Variations and Attributes with Guided Setup

The guided setup walks you through creating attributes and assigning them to variations with clear step-by-step instructions and navigable links. It also helps you configure search and localization.

1. From the Commerce App navigation menu, select **Commerce Setup**.
2. Select **Variation Guided Setup**.



Note: If the Commerce Setup option isn't on the navigation menu, you can add it using the Edit icon.

Each variation has its own SKU. You can track each SKU as a unique product record.

3. Follow the steps to add product variations and attributes.

SEE ALSO:

[Product Variations and Attributes](#)

[Add an Attribute Set to a Product](#)

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce


Product Classes, Variations, and Attributes

A product class determines whether a product is sold individually or can contain variations. Different product classes support different subsets of product elements, such as stock keeping units (SKU) and attribute sets. Product variations let merchants offer various options for a product. Each product variation, also called an attribute, represents a variation of the parent product. Each variation has its own SKU. You can track each SKU as a unique product record. You can group attributes into an attribute set and assign the set to a product.

Configure the Product page layout to include the Product Class and Product SKU fields.

The available product classes are:

- Simple—A product that is purchased individually and isn't associated with variations.
- Variation Parent—A product that is a parent of variation products. A variation parent can't be purchased. Only variations of a parent can be purchased.
- Variation Product—A product that is a child record of a variation parent. Each variation product represents a unique set of variation attribute values and has its own SKU.

 **Note:** You can create variations only from a product with the Variation Parent product class. Cloning a variation product creates a simple product, rather than another variation product.

When the Product Class field is available in the Product page layout, you can track product class values from the Product Workspace.

This table shows the product elements that each class supports.

Product Element	Simple Product Class	Variation Parent Product Class	Product Variation Product Class
SKU	✓	✓	✓
Standard & Custom Fields	✓	✓	✓ Cloned from parent variation product
Attribute Set		✓	
Variation Attribute			✓ Unique by SKU
Images	✓	✓	
Attachments	✓	✓	
Category	✓	✓	Automatically assigned the same category as the variation parent product
Entitlement	✓	✓	✓ Assign the parent variation product to the entitlement first
Price	✓	✓	✓

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

Product Element	Simple Product Class	Variation Parent Product Class	Product Variation Product Class
Orders	✓✓		✓
Localization	✓✓	✓	
Tiered Pricing	✓✓	No	✓
Searchable in Store	✓✓	✓ But the parent variation product doesn't appear in stores	✓
Search Index	✓✓		✓
Add to Cart	✓✓		✓
Add to Wishlist	✓✓		✓
View in Order Summary	✓✓		✓
Inventory	✓✓		✓

SEE ALSO:

[Product Variations and Attributes](#)

Create Attributes for Product Variations

When you create attributes, you identify the features that describe individual product variations. Rather than assign individual attributes to a parent, you group the attributes into an attribute set, which you then associate with one or more products.

Before you create an attribute set, you build a pool of attributes to draw from. Group attributes that apply to a product. For example, the variation parent product is ice cream. It can use the attributes flavor, type, and volume. If you create an attribute set with all these attributes, you can associate one attribute set rather than three. You can include up to five variation attributes in an attribute set.

 **Note:** After you add an attribute set to a product, you can't modify it.

1. Create product attributes.

You can't use the same attribute value to differentiate between variations of a product. Each product variation requires a unique attribute value to determine which product variant to display on the storefront.

- a. From Setup, in the Object Manager, enter *Product Attribute*.
- b. Select **Product Attribute** > **Fields & Relationships** > **New**.
- c. For the attribute's data type, select **Picklist**, and click **Next**.
- d. Enter the picklist details, and click **Next**.
- e. Set the attribute's field-level security to **Visible** for admins and **Read-Only** for all other users.
- f. Click **Next**.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

- g. Select **Product Attribute Page Layout**.
- h. To add more attributes, click **Save & New**. If you're done, click **Save**.
- i. To prevent users from creating variants using values that aren't available, click **Edit** and select **Restrict picklist to the values defined in the value set**.

When you add or change a picklist value for a product attribute, it can take up to 4 hours for the storefront to reflect the change.

2. After you create the attributes for the product, group them into an attribute set.
 - a. From the Commerce app navigation menu, select **Commerce Setup**.
 - b. Open the **Variation Attribute Sets** tab.
 - c. Click **New**.
 - d. Enter a name and description for the attribute set.
 - e. Move up to five attributes to the Selected Fields column, and arrange them in the order that you want them to appear.
 - f. Click **Save**.

SEE ALSO:

[Product Variations and Attributes](#)

Add an Attribute Set to a Product

You can add an attribute set to one or more products, but you can associate a product with only one attribute set.

Make sure that the attribute set is already created. You can associate an attribute set to more than one product, but a product can be associated with only one attribute set.

1. Create a variation parent product.
 - a. From the Commerce app navigation menu, select **Product Workspace**.
 - b. From the page dropdown menu, select **Create Variation Parent**.
 - c. Click the **Product Attribute Set** field, and select the attribute set to associate with this product.
 - d. Enter the variation parent details, and save your work.
2. Create a variation of the parent product. You can create variations only from products in the Variation Parent product class. We recommend that you don't modify custom picklist values of an attribute set after it's associated with a variation product and store.
 - a. From Product Workspace, click the variation parent product that you created or any product in the Variation Parent product class.
 - b. Select the **Variations** tab, and click **Create Variation**.
 - c. Enter the variation attribute details and the product details.
 - d. Save your changes.
3. Assign the variation parent product to a category. The parent product's variations inherit the category assignments from the parent.
 - a. From the product, select the **Related** tab.
 - b. Go to the Categories related list.
 - c. To add the variation parent product to a category, click **Assign**.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

4. Assign an entitlement policy to the variation parent product and to each of its variations.
 - a. From the product, select the **Related** tab.
 - b. Go to the Commerce Entitlement Policies related list.
 - c. To add the variation parent product to an entitlement policy, click **Assign**.
 - d. Select the **Variations** tab, and click a variation product.
 - e. To assign entitlement policies to the variations, repeat these steps.
5. Assign price books to the variation parent product and to each of its variations.
 - a. From the product, select the **Related** tab.
 - b. Go to the Price Books related list.
 - c. To manage the pricing of the variation parent product, click **Add Standard Price** or **Add to Price Book**.
 - d. Select the **Variations** tab, and click a variation product.
 - e. To assign price books to each product variation, repeat these steps.

SEE ALSO:

[Product Variations and Attributes](#)

[Manage Products in the Product Workspace](#)

Make Product Variations and Variation Attributes Searchable

Set up Search for product variations and variation attributes so that they're discoverable in your store.

1. Add product attributes as searchable fields so that they're included in search indexing.
 - a. From the Commerce app navigation menu, select **Stores**.
 - b. Select a store, and click the **Search** tile.
 - c. On the Search page, select **Searchable Fields** > **Manage Searchable Fields**.
 - d. Select the fields to be searchable, and click **Save**.
2. Add attributes as search filters so that they're visible as facets on results and category pages.
 - a. Go back to the Search page, and open the **Results Filters** tab.
 - b. Click **Manage Filters**.
 - c. Move the attributes to use as search filters to the Selected Fields list.
 - d. Arrange the list, and click **Save**.
3. Add the Variation Attributes field to the Results Layout component.
 - a. In Experience Builder, open the **Search Results** page.
 - b. Select the **Results Layout** component.
 - c. In the property editor, click **Add Field**.
 - d. Click the added field.
 - e. In Edit Field, change the field value to **Variation Attributes**.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

- f. Adjust the other properties as needed.
 - g. Save your changes.
 - h. Repeat these steps on the Category Detail page.
4. Rebuild your store's search index.
- a. Return to the Search page, and open the **Search Index Summary** tab.
 - b. Click **Rebuild Index**, and then click **Rebuild**.

SEE ALSO:

[Product Variations and Attributes](#)

Product Variation Grouping

When you show product search results, you have the option of returning all variation products (the children) or only one (the parent). When all results are shown, no grouping is present. When one result is shown, buyers click that result to see all the parent product's variations.

[Get to Know Product Variation Grouping](#)

Use product variation grouping to show product variations grouped under their parent products when the buyer searches for or navigates to a set of results.

[Change Search Settings for Product Variation Grouping](#)

If your store was created after Summer '21, product variation grouping is enabled by default, so you don't need to change your Search settings. If your store was created before Summer '21, you must enable product variation grouping in your Search settings.

[Product and Variation Naming Guidelines](#)

Help customers find what they're searching for with these parent product and variation naming guidelines.

[Set Up a Product Variation Grouping](#)

To simplify search results for products with variations, you can set up a product variation grouping. This lets buyers navigate from a parent product to its child variations.

Get to Know Product Variation Grouping

Use product variation grouping to show product variations grouped under their parent products when the buyer searches for or navigates to a set of results.

A product can be simple, without any variations, like a tool. Or a product can have many variations, like an item of clothing, with each variation having its own SKU. For example, your store offers one-size-fits-all gardening gloves in one color. The gloves are a simple product without variations. You also sell shirts that come in sizes from XS to XL and several colors. Each color-size combination, such as red XS or blue XL, is a product variation, and each has its own SKU.

Let's say someone is shopping for gloves and a shirt. You have options for how to show product variations when the buyer searches for or navigates to a set of results.

- No product variation grouping—You show simple products and each variation product individually. So when the buyer searches for *gloves shirt*, the results page shows one pair of one-size-fits-all gloves and each color-size shirt combination.

EDITIONS

Available in: **Lightning Experience and Salesforce mobile app**

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: **B2B Commerce and D2C Commerce**

- Variation grouping—You show simple products and variation parent products on the initial results page. So when the buyer searches for *gloves shirt*, the results page shows one pair of gloves, a simple product, and one shirt, the variation parent product. On the shirt parent product, buyers click a button or link that takes them to a detail page that shows all the color-size combinations.

Important: Pay close attention to naming conventions for parent products and their variation products. Variation grouping searches, sorts, and filters using the attributes of product variations, but it shows results using the variation parent name. If one parent's variant product attribute alphabetically precedes another parent's product variant attribute, those parents can appear out of order in sort by name results.

When you set up variations, you can choose whether to group product variations together on a results page.

SEE ALSO:


[Product and Variation Naming Guidelines](#)

[Set Up a Product Variation Grouping](#)

Change Search Settings for Product Variation Grouping

If your store was created after Summer '21, product variation grouping is enabled by default, so you don't need to change your Search settings. If your store was created before Summer '21, you must enable product variation grouping in your Search settings.

1. From the Commerce App navigation menu, select **Stores** and then select a store.
2. Click the **Search** tile, and select the **Results Display Settings** tab.
3. Under Results Grouping, click the pencil, select **Group Variations Under Parent**, and save your changes.

 **Note:** It can take up to 2 minutes for the change to take effect.

SEE ALSO:

[Set Up a Product Variation Grouping](#)

Product and Variation Naming Guidelines

Help customers find what they're searching for with these parent product and variation naming guidelines.

Variation grouping searches, sorts, and filters using the attributes of product variations, but it shows results using the variation parent name. To help avoid confusion in search, sort, or filter results, use these guidelines.

- Include the base stock-keeping unit (SKU) in the name of each parent.
- When naming variation products, include the name of the parent variation as a prefix and a combination of the associated variations and the variation SKU.
- When creating descriptions for variation products, use a combination of the parent product description and information specific to the product variation.

For example, say a variation group for two ski goggle parent products has two attributes: Size (S, M, L) and Lens Color (black, blue, green, orange, red, pink). This table provides suggestions for naming the parent products and their medium (M), large (L), red-lensed variations.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited,** and **Developer Editions**

Available in: B2B Commerce and D2C Commerce

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited,** and **Developer Editions**

Available in: B2B Commerce and D2C Commerce

Parent Product Name	Variation Product Names
Ski Pro Slalom Snow Goggles, SKU: 123456	<ul style="list-style-type: none"> • Ski Pro Slalom Snow Goggles M Red, SKU 123456-25 • Ski Pro Slalom Snow Goggles L Red, SKU 123456-26
Ski Pro Super-G Snow Goggles, SKU: 456789	<ul style="list-style-type: none"> • Ski Pro Super-G Snow Goggles M Red, SKU 456789-25 • Ski Pro Super-G Snow Goggles L Red, SKU 456789-26

SEE ALSO:

[Get to Know Product Variation Grouping](#)

[Set Up a Product Variation Grouping](#)

Set Up a Product Variation Grouping

To simplify search results for products with variations, you can set up a product variation grouping. This lets buyers navigate from a parent product to its child variations.

If your store was created after Summer '21, some of these steps have already been done for you.

1. In Experience Builder, open the Search Results or the Category Details page, and click the **Results Layout** component.

Each storefront instance of the Results Layout component is independent from other component instances. So you must set up properties on each storefront instance.
2. In the component property editor, under Results Display Settings, click **Add Field**, and click the new field.
3. In the Edit Field panel, for Field, select **Variation Attributes**.
4. Select **Show link to more options** so buyers can click the link to navigate from a parent product to its child variations.
5. Enter the other Edit Field properties, and save your changes.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer Editions**

Available in: B2B Commerce and D2C Commerce

Results Layout

Results Display Settings

Background Color

Border Color

Border Radius (0px - 20px)

Alignment

Show product image

Fields

- Product Name
- Product Description
- Variation Attributes

Show negotiated price

Negotiated Price Text Size

Call-to-Action Button

Show button

Add to Cart Button Text

View Options Button Text

Edit Field

Field

Show link to more options

* More Options Link Text

Field Text Size

Field Text Color

- Under Call-to-Action, select **Show button**, and enter the button text. Buyers can click the button, but clicking anywhere in the card takes them to a view of the parent product's variations.
- In Experience Builder, click **Publish** to add the changes to your store.

SEE ALSO:

[Change Search Settings for Product Variation Grouping](#)

Entitlement Policies

Entitlement policies are simple entities that bring together buyer groups and products. They define which products a buyer group can see and if the group can also see product prices. When you create a store, a default buyer group is added to a default entitlement policy. B2B stores support multiple entitlement policies. B2C stores support only one entitlement policy.

[Create an Entitlement Policy](#)


Create an entitlement policy declaratively, through the Commerce app.


[View the Buyer Group and Entitlement Policy for B2C Stores](#)

Each B2C store must have one and only one associated buyer group, and all shoppers are assigned to that buyer group. Typically, all products for a B2C store are assigned to a single entitlement policy, which is then associated with the store's buyer group. This relationship of B2C store to buyer group to shoppers and entitlement policy allows shoppers to access products in the store.


Create an Entitlement Policy

Create an entitlement policy declaratively, through the Commerce app.

 **Note:** The components used before the introduction of the B2B or B2C template don't respect associated entitlements. Any customer can see content in those components, regardless of their entitlements. Consider this behavior when thinking of adding components in your store. Also, the entitlement policies that you create are recognized only by B2B or D2C Commerce.


 **Note:** Buyers and shoppers need record-level sharing access to see standard record detail components.

1. From the Commerce App Navigation menu, select **Entitlement Policies**.
2. On the Entitlement Policies page, click **New**.
3. Give your policy a name and add a description.
4. Select whether the buyer groups added to this policy can see products, and then select whether those buyer groups can also see product prices.

 **Note:** For a B2B store, if you want buyers and guest users to see only categories that have entitled products, contact Salesforce customer support to enable this functionality. This feature is available only for catalogs with fewer than 500,000 products.

To view a category or its descendent categories, the buyer or guest user must have entitlement to at least one product within the category. If a buyer has a direct link to a category that isn't entitled, the category appears but doesn't show any products.

5. To enable the policy, click **Active**.

 **Note:** After you save a policy, you can't update an entitlement policy's View Product or View Price in Catalog fields.

6. Click **Save**.
7. Click **Related**.
8. Assign products to the policy.
9. Assign buyer groups to the policy.
10. Rebuild your search index for your changes to take effect.

SEE ALSO:

[Example Strategies for Buyer Groups, Entitlements, and Price Books for B2B Stores](#)

EDITIONS

Available in: **Lightning Experience** and **Salesforce mobile app**

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: **B2B Commerce** and **D2C Commerce**

View the Buyer Group and Entitlement Policy for B2C Stores

Each B2C store must have one and only one associated buyer group, and all shoppers are assigned to that buyer group. Typically, all products for a B2C store are assigned to a single entitlement policy, which is then associated with the store's buyer group. This relationship of B2C store to buyer group to shoppers and entitlement policy allows shoppers to access products in the store.

Important: You can add products without using the B2C data import process. When you add products without using the data import process, they're not automatically added to the entitlement policy. For shoppers to access the products, assign them to the store's buyer group entitlement policy.

To view the default buyer group and entitlement policy that we created for your store:

1. On your store's home page, click the **Administration** tile.
2. Click **Buyer Access**.

The buyer group assigned to your store is listed under Buyer Groups.

3. To see the entitlement policy assigned to the buyer group, click the buyer group name and select the **Related** tab.

Important: When you create a store, a default buyer group and entitlement policy are assigned to the store. You can't choose a different buyer group as the default. Even if you unassign the default buyer group and assign a different one to the store, the original buyer group remains designated as the default. Shoppers who self-register are added to the original (default) buyer group and can't shop the store if you assign a different buyer group. When you use a CSV file to import data into the store, the imported data is always assigned to the default records.

To add your products to an entitlement policy and assign the policy to the buyer group for the store, see [Create an Entitlement Policy](#) on page 89.

EDITIONS

Available in: **Lightning Experience** and **Salesforce mobile app**

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: **D2C Commerce**

Product Sets

A product set is a collection of related products. The parent product is grouped with the related child products. The child products are shown together on the product detail page (PDP), but each child is priced separately. A shopper can add all the products to the cart in a single operation or selectively add individual child products.

B2C stores include a Product Set component. In Experience Builder, you can use this component to show product sets on your PDP. B2B stores created with the LWR template don't include a Product Set component, but you can create a custom component to control the appearance and behavior of the product set on the PDP.

A product set can contain up to 100 child products, but the Product Set component shows a maximum of 20.

[Add Child Components Related List to the Product Page Layout](#)

To create and configure product sets, add the Child Components related list to the Product object's page layout.

[Create a Product Set](#)

Create a product set to show a collection of related products on a single product detail page (PDP).

[Configure a Product Set](#)

Add child products, assign the product set to one or more categories, and assign the product set to one or more entitlement policies. You can also add media images to show on its product detail pages (PDP) and product list pages (PLP).

Add Child Components Related List to the Product Page Layout

To create and configure product sets, add the Child Components related list to the Product object's page layout.

1. From the object management settings, go to Page Layouts to enable quantity rules for a product.
2. Select **Product Layout**.
3. Select **Related Lists**, and drag the **Child Components** related list to the Related Lists section.
4. Save your changes.

SEE ALSO:

[Product Sets](#)

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

Create a Product Set

Create a product set to show a collection of related products on a single product detail page (PDP).

1. From the Commerce App Navigation menu, select **Product Workspace**.
2. From the dropdown menu, select **New Product Set**.
3. Enter the product set details.
 - a. Name the product set and enter the optional details.
 - b. (Optional) Select the product family that the product set belongs to.
A product family groups products together. You can group products in any way that you want. You can use product family values as filters for search results.
 - c. (Optional) Enter a product SKU.
Child products require a SKU, but the product set doesn't.
 - d. To make the product set available in your store, select **Active**.
To make a product set discoverable in a search, after you create the product set, mark the product set as searchable.
 - e. (Optional) Enter a product code.
 - f. (Optional) Enter a product description.
4. Click **Save**, or to continue adding product sets, click **Save & Add**.
When you save a product set, the product page is shown for the product set, and you can configure the product set. Initially, the product set isn't assigned to a category, doesn't have child products, and isn't associated with a store. Configure the product set to make it ready to use in a B2C or B2C store.

SEE ALSO:

[Product Sets](#)

EDITIONS

Available in: Lightning Experience and the Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

Configure a Product Set

Add child products, assign the product set to one or more categories, and assign the product set to one or more entitlement policies. You can also add media images to show on its product detail pages (PDP) and product list pages (PLP).

1. Assign one or more entitlement policies to the product set.

- a.** From the product page, click **Commerce Entitlement Policies**.
- b.** Click **Assign**.
- c.** Search for an entitlement policy, select it, and click **Save**.

Make sure that the product set and its child products are assigned to the same entitlement policy as your store. If you want to use the product set in multiple stores, you assign one entitlement policy per store.

2. Assign one or more categories to the product set.

- a.** From the product page, click **Categories**.
- b.** Click **Assign**.
- c.** Search for a category, select it, and click **Save**.

Make sure that the product set and its child products are assigned to categories from your store's catalog. If you want to use the product set in multiple stores, assign the product set and its child products to categories from the catalogs for both stores.

3. Add child products to the product set.

- a.** From the product page, click **Child Products**.
- b.** Click **Add**.
- c.** Select the child products that you want to add to the product set, and click **Next**.
- d.** For each child product, specify a sequence, quantity, and product relationship type.

The sequence indicates the display order of the child product in the product set. The quantity specifies a default orderable quantity for the child product when it's displayed as part of the product set in the PDP. The product relationship type specifies how the child product relates to the product set. You can select only **Set to Set Component Relationship**.

- e.** Click **Save**.

4. Add media images to the product set.

- a.** From the product page, click **Media**.
- b.** Add images for your PDP and PLP pages.

When you complete your configuration, the product set isn't immediately visible in your store's PDP and PLP pages. You can view your product set in Experience Builder after your store's search index is rebuilt.

SEE ALSO:

[Product Sets](#)

EDITIONS

Available in: Lightning Experience and the Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

Pricing for Commerce Stores

To set up pricing in your store, configure a standard price book along with custom price books for your store and buyer groups. You can also configure the strikethrough price book that highlights reduced pricing for customers. All products must have an entry in the standard price book before you can add them to other price books. When you create a store, a default price book and default strikethrough price book are assigned to the store.

[Set Up Pricing for Commerce Stores](#)

Select a price book, pricing strategy, and a custom pricing service provider.

[Example Strategies for Buyer Groups, Entitlements, and Price Books for B2B Stores](#)

You have multiple options for setting up buyer groups, defining customer entitlements, and assigning the prices that each customer sees. To optimize setup, identify your business requirements. Here are three examples of strategies you can consider for your store.

[Set Up a Standard Price Book](#)

Your pricing setup starts with a standard price book. All products must have an entry in the standard price book before you can add them to custom price books for specific stores or buyer groups. You can have only one standard price book.

[Add Products to a Price Book](#)

When all your products have a standard price, add them to your other price books.

[Create a Buyer Group or Store Price Book](#)

To display prices to your customers, create a buyer group or store price book. You can assign a price book to buyer groups, stores, or both, but you must have at least one. When you assign a price book to a store, any customer who can access the store is eligible for prices within that price book. When you assign a price book to a buyer group, the accounts associated with that buyer group are eligible for prices within that price book.

[Set Up a Pricing Strategy in a B2B Store](#)

In your store, you want your pricing to be as transparent as possible. For a B2B store, choose between Best Price and Priority Price to determine which prices your buyers see.

[Set Up Lowest List Price Compliance](#)

When you announce a promotion or price reduction, a European Union (EU) mandate requires that stores must show the lowest price for a product over the past 30 days. If the original price is displayed and is greater than the list price, the lowest list price also displays. B2C stores must show the lowest price and any price adjustments. B2B stores must show the lowest price and any price adjustments for guest users but don't need to show it for logged-in users. For new stores, the Lowest List Price component is included on the Product Details page. For existing stores, you must add the component to the page. After this feature is enabled, you can't disable it.

[Set Up a Strikethrough Price Book to Highlight Discounts](#)

To highlight a discount that you granted to a buyer, you can show a strikethrough price next to the negotiated price. It's called a strikethrough price because the value is shown with a line through it. The strikethrough price is the product's original price or manufacturer's suggested retail price (MSRP). The strikethrough price book is automatically created with your store.

[Products and Price Books for B2C Stores](#)

The B2C data import process assigns products to an entitlement policy, which is then associated with the store's buyer group. Prices for all products are assigned to the standard price book and the store price book.

[Set Up Price Tiering](#)

To give customers who buy in bulk a price break, create tiered prices based on the number of items purchased. Tiered pricing adjusts prices so that all items receive the discount of the highest tier that the quantity falls in

Set Up Pricing for Commerce Stores

Select a price book, pricing strategy, and a custom pricing service provider.

1. On your store's home page, click the **Administration** tile.
2. In the navigation menu, select **Pricing**.
3. Select **Price Book for Original Price** and **Pricing Strategy**.
4. Optionally, select a custom provider.

You can use AppExchange packages to integrate third-party services. If you prefer to integrate a third-party service without using AppExchange, see examples in GitHub.

- [Reference Implementations for B2B Commerce](#)
- [Reference Implementations for D2C Commerce](#)

To see up an integration, see [B2B Commerce and D2C Commerce Developer Guide](#).

SEE ALSO:

[Create a Buyer Group or Store Price Book](#)

[Set Up a Standard Price Book](#)

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

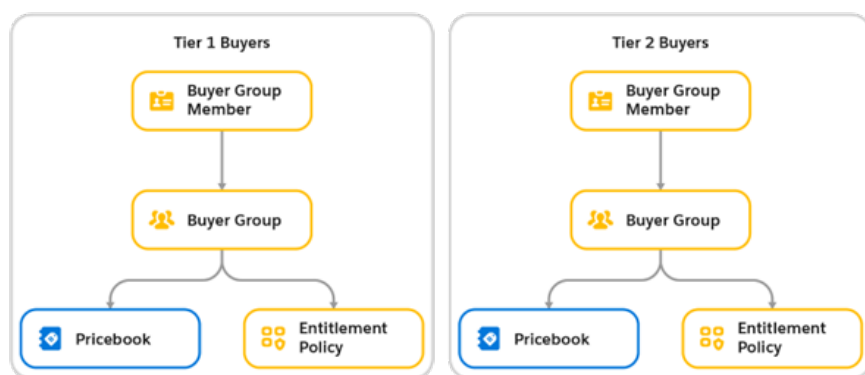
Available in: B2B Commerce and D2C Commerce

Example Strategies for Buyer Groups, Entitlements, and Price Books for B2B Stores

You have multiple options for setting up buyer groups, defining customer entitlements, and assigning the prices that each customer sees. To optimize setup, identify your business requirements. Here are three examples of strategies you can consider for your store.

Create Buyer Tiers

Use the buyer tiers strategy to spur buyer incentive. Buyers in higher tiers progressively get access to more products or deeper discounts. For each tier, set up one entitlement policy, one price book, and one buyer group.



Offer Buyer-Specific Pricing

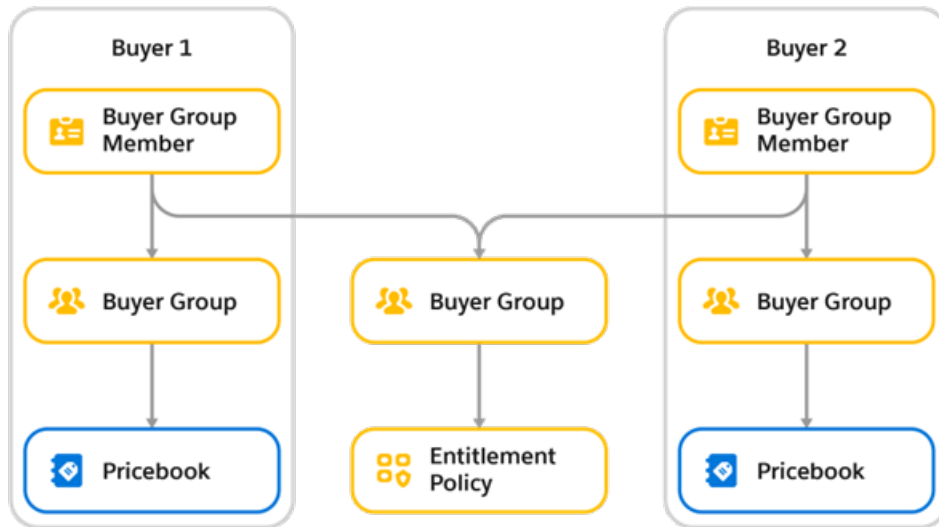
When your goal is to maximize profits, create one buyer group and entitlement policy for all buyers. Then, for each buyer, assign one price book and one buyer group. This strategy lets you set up buyer-specific pricing. This setup also works for use cases with different pricing tiers or groups.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce



Steer Customers to Specific Products

You can steer customers to specific products by controlling their access. Each buyer can see different groups of products based on their negotiated contract.

For each group of products, create one buyer group and one entitlement policy. Then associate each buyer to the buyer group for each group of products that you want the buyer to have access to. A single account can have membership in up to 20 buyer groups.



SEE ALSO:

[Associate a Buyer Group with a B2B Store](#)


[Entitlement Policies](#)

[Pricing for Commerce Stores](#)

Set Up a Standard Price Book

Your pricing setup starts with a standard price book. All products must have an entry in the standard price book before you can add them to custom price books for specific stores or buyer groups. You can have only one standard price book.

1. From the Commerce App Navigation menu, select **Product Workspace**.
2. Select an existing product or create one.
3. On the Related tab, click **Add a Standard Price**.
4. Select a currency.

 **Note:** For B2B stores, the standard price book contains an entry for every currency that you want to sell an item in. For example, to sell an item in USD and CAD, you make two entries for the same item.

5. Select **Active**.
6. In the List Price field, enter the standard price.
You can add any price as the standard list price. When you add the product to a store or buyer group price book, you can change its price. The price in an assigned price book takes priority.
7. If the currency that you selected is the only currency that you plan to use, click **Save**. To add more currency types for the same product, click **Save & New**.

SEE ALSO:

[Pricing for Commerce Stores](#)

Add Products to a Price Book

When all your products have a standard price, add them to your other price books.

1. From the Commerce App Navigation menu, select **Pricing Workspace**.
2. On the **Price Books** tab, select a price book.
3. Click the **Related** tab.
4. Under Price Book Entries, click **Add Products**.
5. Select a currency for the products that you're adding.
6. Search for and select products that you want to the price book.
If you haven't added the product to your standard price book, it doesn't appear in your search.
7. Click **Next**.
8. Add a list price, and click **Save**.

SEE ALSO:

[Pricing for Commerce Stores](#)

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

EDITIONS

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Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

Create a Buyer Group or Store Price Book

To display prices to your customers, create a buyer group or store price book. You can assign a price book to buyer groups, stores, or both, but you must have at least one. When you assign a price book to a store, any customer who can access the store is eligible for prices within that price book. When you assign a price book to a buyer group, the accounts associated with that buyer group are eligible for prices within that price book.

A store price book is useful for a broad range of users because it sets pricing for the entire store. In contrast, a buyer group price book applies to only the buyer group that it's assigned to. If a buyer user belongs to multiple buyer groups, it's possible for that user to have multiple price books assigned to them. However, a buyer group must be assigned to the store where the price book appears for the buyers to see pricing in that price book.

For guidance on different ways to set up store or buyer group price books for your B2B store, see [Strategies for Buyer Groups, Entitlements, and Price Books for B2B stores](#) on page 94.

1. From the Commerce App Navigation menu, select **Pricing Workspace**.
2. Click **New**.
3. Give your price book a name.
4. Optionally, add a description and set a valid time period.
5. Select **Active**, and then click **Save**.
6. From your new price book, select the **Related** tab.
7. In the Buyer Groups and Stores sections, click **Assign** and select the buyer groups or stores that you want to assign the price book to.
8. Save your changes.

SEE ALSO:

[Pricing for Commerce Stores](#)

Set Up a Pricing Strategy in a B2B Store

In your store, you want your pricing to be as transparent as possible. For a B2B store, choose between Best Price and Priority Price to determine which prices your buyers see.

In a B2B store, a buyer can be a member of multiple buyer groups, or multiple price books can be assigned to a buyer group or store. So it's possible to have multiple price books assigned to a single buyer. When multiple prices are available to the same user, you can set a pricing strategy to determine which price is shown.

1. Navigate to the B2B store where you want to change your pricing strategy.
2. Under Manage Your Store, select **Administration**.
3. Under Pricing, click the pencil icon to edit the **Pricing Strategy**.
4. From the dropdown, select **Best Price** or **Priority Price** and save.
 - Best Price—Assigns the lowest possible price available in all the assigned price books.
 - Priority Price—Assigns prices in the order that you prioritize the price books within a buyer group.
5. Navigate to the buyer group where you want to prioritize your price books.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce

6. Click the **Related** tab.
7. Under Price Books, find the price book you want to prioritize first, and select the dropdown arrow. Click **Edit** to edit the buyer group price book.
8. For Priority, enter *1* and click **Save**.
9. Repeat for each price book in your buyer group until they're all prioritized.

Example:

- **Best price**—In a B2B store, Jamie is assigned to two different buyer groups. The store price book lists a product for \$10. One of Jamie's buyer groups lists the item for \$9, and the other buyer group lists it for \$7. Jamie is technically assigned to all three prices, but because the store uses a best price strategy, the item costs Jamie \$7.
- **Priority price**—Mark is assigned to a buyer group with two assigned price books, Fall Collection and Platinum Buyer. The store admin has changed the pricing strategy to priority pricing and changed the priority order. The admin decides that the Platinum Buyer price book takes first priority. If an item is listed as \$15 in the Platinum Buyer price book and \$14 in the Fall Collection price book, Mark sees the item as \$15.

SEE ALSO:

[Pricing for Commerce Stores](#)

Set Up Lowest List Price Compliance

When you announce a promotion or price reduction, a European Union (EU) mandate requires that stores must show the lowest price for a product over the past 30 days. If the original price is displayed and is greater than the list price, the lowest list price also displays. B2C stores must show the lowest price and any price adjustments. B2B stores must show the lowest price and any price adjustments for guest users but don't need to show it for logged-in users. For new stores, the Lowest List Price component is included on the Product Details page. For existing stores, you must add the component to the page. After this feature is enabled, you can't disable it.

This rule doesn't apply to:

- Goods with a short shelf life, such as dairy items.
- Free products or similar promotions, such as buy 2, get 3.
- Users logged in to B2C stores. However, it does apply to guest users.

Deleting a price book or price book entry resets the lowest list price. Manually updating the lowest list price isn't recommended because it can cause an incorrect value for lowest unit price and the store won't be in compliance with the mandate.

1. In a product workspace, select **Product Workspace > Commerce Setup**.
2. In the left panel, under Pricing Setup, select **Lowest List Price** and enable it.
3. Set up layout visibility in Salesforce Setup.
 - a. In Salesforce Setup, open Object Manager and select **Price Book Entry**.
 - b. Select **Fields & Relationships**.
 - c. Select **Set History Tracking**.
 - d. Select **List Price** and save your changes.
 - e. Select **Page Layouts**.

EDITIONS

Available in: **Lightning Experience** and **Salesforce mobile app**

Available in: **Enterprise, Unlimited,** and **Developer Editions**

Available in: **B2B Commerce** and **D2C Commerce**

- f. Select **Price Book Entry**.
- g. Drag the Lowest List Price field into Fields in the Price Book Entry Detail section.

SEE ALSO:

[Pricing for Commerce Stores](#)

Set Up a Strikethrough Price Book to Highlight Discounts

To highlight a discount that you granted to a buyer, you can show a strikethrough price next to the negotiated price. It's called a strikethrough price because the value is shown with a line through it. The strikethrough price is the product's original price or manufacturer's suggested retail price (MSRP). The strikethrough price book is automatically created with your store.

1. From the Commerce App Navigation menu, select **Pricing Workspace**.
2. Select the strikethrough price book that's automatically generated when you create your store. To designate a different price book as your strikethrough price book, navigate to your store page and click the **Administration** tile. On the **General Settings** tab, update the **Price Book for Original Price**.
3. Add entries for the products that require a strikethrough price.
4. Save your changes.

A few things to keep in mind when creating strikethrough pricing:

- When an original price is the same or lower than the negotiated price, only the negotiated price is shown.
- The prices you add to the price book for original prices are the full price of the product or the price that is displayed with a strikethrough. You can update a new or sale price in the store or buyer group price book.
- A product added to the strikethrough price book must have an entry in the store or buyer group price book.

SEE ALSO:

[Pricing for Commerce Stores](#)

Products and Price Books for B2C Stores

The B2C data import process assigns products to an entitlement policy, which is then associated with the store's buyer group. Prices for all products are assigned to the standard price book and the store price book.

If you add products without using the B2C data import process, you must assign them to the entitlement policy assigned to the store's buyer group so that shoppers can access the products. For more information, see [View the Buyer Group and Entitlement Policy for B2C Stores](#) on page 90.

To edit existing price books, or to create price books for the store, see [Create Price Books and Associate Them with a Store or Buyer Group](#). For B2C stores, only the Best Price strategy is applicable. The lowest price available in all the store's price books is assigned to the product.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited,** and **Developer Editions**

Available in: B2B Commerce and D2C Commerce

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited,** and **Developer Editions**

Available in: D2C Commerce

B2C stores support multiple currencies. To offer products in multiple currencies, create a separate store for each currency.

SEE ALSO:

[Manage Products in the Product Workspace](#)

[Manage Products in the Product Workspace](#)


[Import Data for a Store Using a CSV File](#)

[Import and Export Commerce Data](#)

Set Up Price Tiering

To give customers who buy in bulk a price break, create tiered prices based on the number of items purchased. Tiered pricing adjusts prices so that all items receive the discount of the highest tier that the quantity falls in.

1. From the Commerce App Navigation menu, select **Price Adjustment Schedules** and click **New**.
2. Name the price adjustment schedule, and select the currency.
3. Click **Save**.
4. Click **Add Tier**.

 **Note:** When using fractional quantities with tiered pricing, the quantity rounds down to the nearest whole number to determine the tier and apply the appropriate price. For example:

Default Price: 200

Tier 1: 1–10 is 10% off

Tier 2: 11–20 is 20% off

If a buyer enters a quantity of 10.5, 10% off (Tier 1) is applied. However, the 10.5 quantity is shown in the cart and in checkout.

5. For the lower bound, enter the number of items that must be purchased to reach the first pricing tier.
6. For the upper bound, enter the number of items that must be purchased before the buyer reaches the next tier. If there's no limit, the upper bound isn't required.
7. Choose whether to provide price breaks based on a percentage or a fixed number.

	*Lower Bound	Upper Bound	*Tier Type	*Tier Value	
1	20	49	Adjustment Percentage	10.00	
2	50	499	Adjustment Percentage	12.00	
3	500		Adjustment Percentage	15.00	

8. Save your adjustment schedule.
9. Under Is Active, click **Edit**, activate your schedule, and click **Save**.
10. Select **Add Price Book Entries**.
11. Select the price book that you want to add the price adjustment schedule to.

EDITIONS


Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

12. In the Add Price Book Entries window, select the products that you want to add the price adjustment to.

13. Click **Finish**.

 **Example:** You want to reduce the price by 10% when a buyer purchases more than 100 items, and 15% for more than 200 items. An item that costs \$100 is reduced to \$90 after the customer meets the 100-item threshold. It's reduced to \$85 dollars when the 200-item amount is met.

You could also choose a fixed amount, such as reducing the price by \$10 at every tier level. In that case, an item costs \$90 after 100 items, and \$80 after 200 items.

 **Note:** You can also manage your price adjustment schedules through the Pricing Workspace.

- Navigate to Price Books, and select the price book where you want to make changes.
- On the **Related** tab, under Price Book Entries, select the dropdown arrow.
- Choose **Manage Price Adjustments**.

SEE ALSO:

[Pricing for Commerce Stores](#)

Commerce Checkout

Add checkout functionality to your B2B or B2C store. Set up payment, shipping, and tax calculation services. If you have a B2B store created with the Aura template, install and customize checkout flows.

[Add a Payment Service for Store Checkout](#)

Include a payment service as part of your store's checkout process so that you can collect customer payment information and process refunds. Use Salesforce Payments, if licensed, or a third-party service.

[Set Up Shipping for Commerce Stores](#)

A shipping calculation service determines how much customers pay for shipping. Use Salesforce's native shipping service or add a third-party shipping integration to your store checkout.

[Add a Tax Calculation Service](#)

A tax calculation service determines how much customers pay in taxes based on their location. Use the built-in Salesforce tax service, or map a third-party tax calculation service to your store checkout.

[Configure B2B Commerce for Salesforce Billing](#)

B2B Commerce and the Salesforce Billing package work together seamlessly after some preliminary setup. To ensure successful interoperability, make sure that your product records contain values for fields required by Salesforce Billing. Also make sure that your admin correctly sets field-level permissions for the Buyer profile.

[Preparing Salesforce for Asynchronous Order Processing](#)

Starting in Spring '23, B2C stores and B2B stores created with the LWR template process orders asynchronously. Asynchronous order processing improves store performance and responsiveness. However, when an order is processed asynchronously, the store can sometimes generate PlaceOrderFailed exceptions. To handle these exceptions, you activate the Retrigger Place Order flow and give the Commerce admin access to the ProcessException record.

[Configure Split Order Fulfillment](#)

When a customer chooses to send products in one order to different addresses, you can fulfill the order from multiple locations. The Split Order Fulfillment flows create a fulfillment order for each address. You can also manually split fulfillment for an order.

Considerations for Large Carts

Most stores limit cart size to 500 line items per order. However, if your B2B or B2C store requires a higher limit, you can enable support for large carts to process up to 2,000 line items per order. When enabling large carts, keep these considerations in mind.

Checkout for a B2B Store (Aura)

If your B2B store is created with the Aura template, you manage your checkout experience from Flow Builder and then configure the presentation in Experience Builder. With Flow Builder, you can integrate your external systems into your checkout and see a visual representation of the cart-to-order process. Use checkout components in Experience Builder to show your store checkout and order summary to buyers. If your B2B store is built with the LWR template, you don't have to use flows. Instead, you modify your checkout directly in Experience Builder.

Add a Payment Service for Store Checkout

Include a payment service as part of your store's checkout process so that you can collect customer payment information and process refunds. Use Salesforce Payments, if licensed, or a third-party service.

If you created your store with an LWR template, we recommend using Salesforce Payments for your payment service provider. Salesforce Payments is optimized to work with Commerce and provides a Salesforce Payments component for your Checkout page. The component automatically pulls in the payment options that you configured. The component also provides fraud protection using 3D Secure authentication.

1. On your store page, select the **Administration** tile.
2. Select **Payments**.
3. Choose the service that you want to use.
 - To use Salesforce Payments, on the Salesforce Payments tile, click **Configure**. Then, set up the merchant account. If you don't see a Salesforce Payments tile, contact your Salesforce account executive.
 - To use a third-party service, on the Payment Provider or Alternative Payment Provider tile, click **Link Integration**. Then, select a gateway provider from a third-party package. If no adapter is listed, get one from AppExchange or create one. Check the listings for a package that supports a B2B or B2C store.

After you configure your payment service, confirm that your store's Checkout page is configured correctly. See [Customize Payments in Checkout](#) on page 260.

To integrate a third-party service without using AppExchange, see [Reference Implementations for B2B Commerce](#) and [Reference Implementations for D2C Commerce](#). To create a custom package, see [Payments Integration](#) in the B2B Commerce and D2C Commerce Developer Guide.

SEE ALSO:

[Salesforce Payments](#)

[Integration Architecture for B2B and B2C Stores \(LWR\)](#)

[Checkout Integration](#)

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

Set Up Shipping for Commerce Stores

A shipping calculation service determines how much customers pay for shipping. Use Salesforce's native shipping service or add a third-party shipping integration to your store checkout.

Set Up Salesforce Native Shipping for a Commerce Store

A shipping calculation service determines how much customers pay for shipping. With Salesforce's native shipping service, you can offer customers default free shipping and flat and price-based flexible rates in a B2B or B2C store created with an LWR template. You can also create custom shipping zones.

Add a Third-Party Shipping Service to a Commerce Store

A shipping calculation service determines how much customers pay for shipping. Instead of using Salesforce's native shipping service, you can add a third-party shipping application to your store checkout or set up your own integration.

Set Up Salesforce Native Shipping for a Commerce Store

A shipping calculation service determines how much customers pay for shipping. With Salesforce's native shipping service, you can offer customers default free shipping and flat and price-based flexible rates in a B2B or B2C store created with an LWR template. You can also create custom shipping zones.

Before setting up the shipping service, configure the supported ship-to countries for your store. If you don't have at least one supported ship-to country selected, address validation fails. See [Configure Store Languages, Ship-To Countries, Currencies, and Tax](#) on page 214.

1. If you have a store created before the Spring '24 release, add the native shipping service code to your store. If your store was created after Spring '24, skip to Step 2 because native shipping is already included.
 - a. From the Setup menu on your store's home page, click **Developer Console**.
 - b. From Debug, click **Open Execute Anonymous Window**.
An Apex editor window opens.
 - c. Copy this code snippet into the Apex editor window.

```
ID webStoreId = '0ZE00000000000000000'; // !!! please replace !!!

// 1. Set up the default shipping profile (ShippingConfigurationSet entity object)
ShippingConfigurationSet[] shippingConfigs = new List<ShippingConfigurationSet>();

ShippingConfigurationSet shippingProfile = new ShippingConfigurationSet (Name='General',
TargetRecordId=webStoreId, IsDefault=true);
shippingConfigs.add(shippingProfile);
insert shippingConfigs;

// 2. Set up rate group (ShippingRateGroup entity)
ShippingRateGroup[] shippingRateGroups = new List<ShippingRateGroup>();

ShippingRateGroup shipRateGroup1 = new ShippingRateGroup (Name='Shipping rate group
1',
ShippingProfileId=shippingProfile.Id);
shippingRateGroups.add(shipRateGroup1);
insert shippingRateGroups;

// 3. Set up a shipping zone (ShippingRateArea entity)
ShippingRateArea[] shippingRateArea = new List<ShippingRateArea>();
```

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

```

ShippingRateArea shipRateArea1 = new ShippingRateArea(Name='Shipping rate area US',
ShippingRateGroupId = shipRateGroup1.Id,
Countries='US');
shippingRateArea.add(shipRateArea1);
insert shippingRateArea;

// 4. Set up three simple shipping rates (StandardShippingRate entity)

StandardShippingRate[] standardShippingRates = new List<StandardShippingRate>();

StandardShippingRate shipRate1 = new StandardShippingRate(Name='Free Shipping 7-10
Days',
ShippingZoneId = shipRateArea1.Id,
Price=0.0);

StandardShippingRate shipRate2 = new StandardShippingRate(Name='Overnight Shipping',
ShippingZoneId = shipRateArea1.Id,
Price=12.0);

StandardShippingRate shipRate3 = new StandardShippingRate(Name='Express Shipping 2-3
Days',
ShippingZoneId = shipRateArea1.Id,
ConditionFactor='OrderPriceFactor',
ConditionRangeMin=0.0,
ConditionRangeMax=100.0,
Price=5.0);

standardShippingRates.add(shipRate1);
standardShippingRates.add(shipRate2);
standardShippingRates.add(shipRate3);

insert standardShippingRates;

```

- d. Replace the store ID with your 18-character ID.

You can find your ID in your store's home page URL. It begins with "webStoreId=".



- e. Execute the code, and return to your store's home page.
2. Review your shipping profile and customize the rates as needed.
 - a. On your store's home page, click the **Administration** tile.
 - b. In the navigation menu, select **Shipping Calculation**.
Your general shipping profile is now listed in the Providers section. Your profile is based on your store's default ship-to country and currency.
 - c. To edit or delete a shipping rate, click the dropdown arrow.
 3. Create shipping zones and rates.

You can combine one or more countries that share a shipping rate in a zone.

- a. Click **New Zone** and enter a name.
- b. Select the countries to add to the zone, and click **Save**.
- c. Click **New Rate** and enter a name.
- d. Set the price, currency, and any conditions for your rate, and click **Save**.

SEE ALSO:

[Integration Architecture for B2B and B2C Stores \(LWR\)](#)

[Checkout Integration](#)

Add a Third-Party Shipping Service to a Commerce Store

A shipping calculation service determines how much customers pay for shipping. Instead of using Salesforce's native shipping service, you can add a third-party shipping application to your store checkout or set up your own integration.

You can use AppExchange packages to integrate third-party services. If you prefer to integrate a third-party service without using AppExchange, see examples in GitHub.

- [Reference Implementations for B2B Commerce](#)
- [Reference Implementations for D2C Commerce](#)

To set up an integration, see [B2B Commerce and D2C Commerce Developer Guide](#).

1. On your store's home page, click the **Administration** tile.
2. In the navigation menu, select **Shipping Calculation**.
3. Select your integration provider.

Configure the supported ship-to countries for your store. If you don't have at least one supported ship-to country selected, address validation fails. See [Configure Store Languages, Ship-To Countries, Currencies, and Tax](#) on page 214.

SEE ALSO:

[Integration Architecture for B2B and B2C Stores \(LWR\)](#)

[Checkout Integration](#)

Add a Tax Calculation Service

A tax calculation service determines how much customers pay in taxes based on their location. Use the built-in Salesforce tax service, or map a third-party tax calculation service to your store checkout.

If you want to integrate a third-party service, we recommend using an AppExchange package. If you prefer integrating a third-party service without using AppExchange, see reference examples in GitHub.

- [Reference Implementations for B2B Commerce](#)
- [Reference Implementations for D2C Commerce](#)

For information on how to set up an integration, see the [B2B Commerce and D2C Commerce Developer Guide](#).

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

1. On your store's page, click the **Administration** tile.
2. In the navigation menu, select **Tax Calculation**.
3. In the Tax Calculation window, click **Link Integration**.
4. In the Select Integration window, choose the service that you want to use.
 - If your store tax type is gross, you can use the Salesforce tax service. To use the Salesforce service, select **Standard Tax, Salesforce Service**. Follow the steps in [Select Salesforce Tax Solution and Assign a Tax Policy to a Store](#) on page 223.
 - To use a third-party service, click **Get App from AppExchange**. Download the tax calculation service, and follow the instructions on the AppExchange package. Check AppExchange listings carefully. A package can support only B2C stores, only B2B stores, or both types of stores.

SEE ALSO:

[Integration Architecture for B2B and B2C Stores \(LWR\)](#)

[Checkout Integration](#)

Configure B2B Commerce for Salesforce Billing

B2B Commerce and the Salesforce Billing package work together seamlessly after some preliminary setup. To ensure successful interoperability, make sure that your product records contain values for fields required by Salesforce Billing. Also make sure that your admin correctly sets field-level permissions for the Buyer profile.

Salesforce Billing requires values for the following fields in your product records: Billing Rule, Charge Type, Revenue Recognition Rule, and Tax Rule. After your product records are populated with the required field values, you can set field-level permissions for the Buyer profile. You set field-level permissions for both the Product and Order Product objects.

1. From Setup, in the Quick Find box, enter *Object Manager*, and select **Object Manager**.
2. Grant edit access to the Buyer profile for the following Product fields: Billing Frequency, Billing Rule, Billing Type, Charge Type, Revenue Recognition Rule, and Tax Rule.
 - a. From Object Manager, in the Quick Find box, enter *Product*, select **Product**, and then click **Fields & Relationships**.
 - b. For each of the preceding fields, click the field name, click **Set Field-Level Security**.
 - c. Grant edit access for the Buyer profile, and click **Save**.
If you select the **Visible** checkbox only, the Buyer profile has edit access to the field.
3. Grant edit access to the Buyer profile for the following Order Product fields: Billing Treatment, Charge Type, Legal Entity, and Tax Treatment.
 - a. From Object Manager, in the Quick Find box, enter *Order Product*, select **Order Product**, and then click **Fields & Relationships**.
 - b. For each of the preceding fields, click the field name, and click **Set Field-Level Security**.
 - c. Grant edit access for the Buyer profile, and click **Save**.
If you select the **Visible** checkbox only, the Buyer profile has edit access to the field.
4. Grant to the Buyer profile read-only access to the following Order Product fields: Invoice Run Processing Status, Invoice Run Status (Index), Order Product Bookings, Revenue Allocation Amount, Revenue Expected Amount, Revenue Liability Amount, Revenue Recognition Rule, Revised Order Product, and Tax Rule.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce

- a. From Object Manager, in the Quick Find box, enter *Order Product*, select **Order Product**, and then click **Fields & Relationships**.
- b. For each of the preceding fields, click the field name, and click **Set Field-Level Security**.
- c. Grant read-only access for the Buyer profile, and click **Save**.

If you select both the **Visible** and the **Read-Only** checkboxes, the Buyer profile has read-only access to the field.

SEE ALSO:

[Manage Your Billing Processes with Salesforce Billing](#)

Preparing Salesforce for Asynchronous Order Processing

Starting in Spring '23, B2C stores and B2B stores created with the LWR template process orders asynchronously. Asynchronous order processing improves store performance and responsiveness. However, when an order is processed asynchronously, the store can sometimes generate `PlaceOrderFailed` exceptions. To handle these exceptions, you activate the `Retrigger Place Order` flow and give the Commerce admin access to the `ProcessException` record.

[Configure Sharing Settings for the Commerce Admin](#)

To let the Commerce admin resolve process exceptions for failed orders, you modify sharing settings for the `ProcessException` object.

[Deploy the Retrigger Place Order Flow](#)

The `Retrigger Place Order` flow helps the Commerce admin handle `PlaceOrderFailed` exceptions. When a `ProcessException` record is created, the admin can view the record to investigate the cause and fix it. When the Commerce admin changes the record's status to `Resolved`, the `Retrigger Place Order` flow places the order again. Activate this flow to use asynchronous order processing.

[Resolve a `ProcessException` and Place the Order Again](#)

When an asynchronous order fails with a `PlaceOrderFailed` exception, the exception is converted into a `ProcessException` record. The Commerce admin can then view the record and investigate the cause of the error. After the admin fixes the problem and changes the record's status to `Resolved`, the `Retrigger Place Order` flow places the order again.

EDITIONS

Available in: **Lightning Experience** and **Salesforce mobile app**

Available in: **Enterprise, Unlimited,** and **Developer Editions**

Available in: **B2B Commerce** and **D2C Commerce**

Configure Sharing Settings for the Commerce Admin

To let the Commerce admin resolve process exceptions for failed orders, you modify sharing settings for the `ProcessException` object.

These steps assume that you've already defined a role for the Commerce admin.

1. From Setup, in the Quick Find box, enter *Sharing Settings*, then select **Sharing Settings**.
2. Configure the organization-wide sharing settings.
 - a. In the Organization-Wide Defaults section, click **Edit**.
 - b. For the `ProcessException` object, set the default internal access to **Public Read/Write**, and set the default external access to **Private**.
 - c. Click **Save**.
3. Define a sharing rule for the `ProcessException` object.

EDITIONS

Available in: **Lightning Experience** and **Salesforce mobile app**

Available in: **Enterprise, Unlimited,** and **Developer Editions**

Available in: **B2B Commerce** and **D2C Commerce**

- a. In the Process Exception Sharing Rules section, click **New**.
- b. Enter a name for the rule.
- c. For rule type, select **Based on record owner**.
- d. For records to be shared, select **Public Groups** and **All Customer Portal Users**.
- e. For users to share, select **Roles** and select the role that you created for the Commerce admin.
- f. For access level, select **Read/Write**.
- g. Click **Save**.

SEE ALSO:

[Configure Sharing Settings for the Commerce Admin](#)

Deploy the Retrigger Place Order Flow

The Retrigger Place Order flow helps the Commerce admin handle PlaceOrderFailed exceptions. When a ProcessException record is created, the admin can view the record to investigate the cause and fix it. When the Commerce admin changes the record's status to Resolved, the Retrigger Place Order flow places the order again. Activate this flow to use asynchronous order processing.

Before deploying the Retrigger Place Order flow, make sure that you configure sharing settings for the Commerce admin.

1. If your store was created using `sfdx` after the Summer '23 release, go to step 3 to activate the preinstalled Retrigger Place Order flow.
2. If your store was created before Summer '23:
 - a. In your browser, go to <https://github.com/forcedotcom/commerce-on-lightning>.
 - b. If you haven't already, clone the commerce-on-lightning repo.
 - c. Check out the main branch.
 - d. Open a command prompt and navigate to the `commerce-on-lightning/examples/b2b/checkout/retrigger-place-order` directory.
 - e. Deploy the flow by using SFDX:

```
sfdx force:mdapi:deploy -d <path-to-this-directory> -w -1
```

3. Activate the flow.
 - a. From Setup, in the Quick Find box, enter `Flows`, and select **Flows**.
 - b. Click **Retrigger Place Order**.
 - c. Click **Activate**.

SEE ALSO:

[Configure Sharing Settings for the Commerce Admin](#)

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Resolve a ProcessException and Place the Order Again

When an asynchronous order fails with a PlaceOrderFailed exception, the exception is converted into a ProcessException record. The Commerce admin can then view the record and investigate the cause of the error. After the admin fixes the problem and changes the record's status to Resolved, the Retrigger Place Order flow places the order again.

Before the Commerce admin performs the following steps, make sure that you configure sharing settings for the Commerce admin.

1. From the navigation menu, click **Process Exceptions**.
2. On the Process Exceptions page, if a process exception has a New status and the type is PlaceOrderFailed, open the exception.
3. Investigate and, if possible, fix the problem that caused the order to fail.
4. After the problem is fixed, change the exception record's status to Resolved.
Changing the record's status to Resolved causes the Retrigger Place Order flow to place the order again.

SEE ALSO:

[Configure Sharing Settings for the Commerce Admin](#)

Configure Split Order Fulfillment

When a customer chooses to send products in one order to different addresses, you can fulfill the order from multiple locations. The Split Order Fulfillment flows create a fulfillment order for each address. You can also manually split fulfillment for an order.

1. Enable Split Shipping, and set up multiple delivery groups. See [Enable Split Shipping for Commerce Stores](#) on page 261.
2. In your browser, go to the [commerce-on-lightning repo](#).
3. Follow the steps in the repo to deploy and activate the flows.
 - Create OrderSummaryRoutingSchedule on OrderSummary event—This flow is triggered when a customer places an order and generates an order summary. It creates an Order Summary Routing Schedule record that includes the order summary ID, a status of Scheduled, and the scheduled date and time set to Current Date/Time. The flow then triggers the Create Fulfillment Orders on OrderSummaryRoutingSchedule flow.
 - Create Fulfillment Orders on OrderSummaryRoutingSchedule—This flow is triggered by the Create OrderSummaryRoutingSchedule on OrderSummary event flow. A user can also manually trigger this flow by creating an Order Summary Routing Schedule record with a Scheduled status. It triggers the Create Fulfillment Orders from Order Summary Subflow.
 - Create Fulfillment Orders from Order Summary Subflow—This flow is triggered by the CreateFulfillment Orders on OrderSummaryRoutingSchedule flow. It creates corresponding FulfillmentOrder, FulfillmentOrderLineItem, FulfillmentOrderItemAdjustment, FulfillmentOrderItemTax records for each delivery group in the order.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

Considerations for Large Carts

Most stores limit cart size to 500 line items per order. However, if your B2B or B2C store requires a higher limit, you can enable support for large carts to process up to 2,000 line items per order. When enabling large carts, keep these considerations in mind.

Enable Promotion Support

Make sure to enable promotion support for large carts. Otherwise, promotions aren't evaluated for carts with a total quantity of more than 10,000. To request promotion support for large carts, contact your Salesforce Administrator.

Understand Changes to Promotion Functionality

After you enable promotion support for large carts, promotions ignore quantity limits on discounts, which can impact certain promotion scenarios. Here are some examples.

- **Total Fixed Price discounts**—When you create a Total Fixed Price discount, you set a quantity limit to offer a select number of items for a specific reduced rate. For example, you offer three shirts for \$50. Because the promotion evaluator ignores quantity limits for large carts, Total Fixed Price promotions sometimes result in either no discount or a larger discount than expected. If you enable promotion support for large carts, we recommend not using Total Fixed Price discounts.
- **Percent Off, Fixed Amount Off Unit, and Fixed Price discounts**—Quantity limits are ignored, so discounts apply to all items that meet the conditions. For example, you offer a 10% discount on an item priced at \$10, but limit the quantity to one. If a customer adds a quantity of 10 for this item, the result is a \$10 discount.
- **Buy 1, Get 1**—Because quantity is ignored on a line item, a line item counts as only one qualifying item. Therefore, two items with the same SKU don't qualify for a "Buy 1, Get 1" promotion. Instead, consider creating promotions for "Buy X, Get Y."

Checkout for a B2B Store (Aura)

If your B2B store is created with the Aura template, you manage your checkout experience from Flow Builder and then configure the presentation in Experience Builder. With Flow Builder, you can integrate your external systems into your checkout and see a visual representation of the cart-to-order process. Use checkout components in Experience Builder to show your store checkout and order summary to buyers. If your B2B store is built with the LWR template, you don't have to use flows. Instead, you modify your checkout directly in Experience Builder.

[Build a Checkout Flow for a B2B Store \(Aura\)](#)

After your developer runs an SFDX script to install a checkout flow, you can save and activate your own customizable flow for your B2B store created with the Aura template. If you created your B2B store with the LWR template, you don't need to build a checkout flow.

[Edit Checkout Components for a B2B Store \(Aura\)](#)

Use Experience Builder to edit checkout, cart, and order summary components in your checkout flow. If you have a B2B store built with the LWR template, you don't need to install a checkout flow.

[Customize Your Checkout Flow for a B2B Store \(Aura\)](#)

You can use the default subflows as is or modify them. Fully customize your checkout by removing, adding, and reordering steps or exchanging part of a default subflow with a custom subflow. If you have a B2B store built with the LWR template, you don't need to install a checkout flow.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**


Available in: B2B Commerce and D2C Commerce

Build a Checkout Flow for a B2B Store (Aura)

After your developer runs an SFDX script to install a checkout flow, you can save and activate your own customizable flow for your B2B store created with the Aura template. If you created your B2B store with the LWR template, you don't need to build a checkout flow.

Before you begin, make sure that your Salesforce developer performs the steps in [B2B Commerce Checkout Flow](#).

1. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
2. Select your store's installed and deployed checkout flow, for example, **(Checkout) Main**, and click **Save As**.

 **Note:** Select only the (Checkout) Main, (Checkout) Main with Salesforce Pricing and Promotions, or Checkout -Reentrant flows. These flows include all necessary subflows. Don't select Checkout Flow Template or any subflows.

3. Give your new flow a label and a unique API name.
This is the flow that you customize in Flow Builder. Don't customize the checkout flow that was installed and deployed using SFDX, for example, (Checkout) Main.
4. Select **Show Advanced**.
5. Under How to Run the Flow, select **System Context with Sharing—Enforces Record-Level Access**.
6. If you use Salesforce Order Management, customize your checkout flow and the Activate Order subflow to create managed order summaries.
7. Save and activate your flow.

SEE ALSO:

[Lightning B2B Commerce Checkout Flow](#)

Edit Checkout Components for a B2B Store (Aura)

Use Experience Builder to edit checkout, cart, and order summary components in your checkout flow. If you have a B2B store built with the LWR template, you don't need to install a checkout flow.

1. In Experience Builder, navigate to the Checkout page.
2. Select the **Checkout** component, and select a flow that you created from the installed flow. Don't select the installed flow.
3. To customize the Checkout button, navigate to the Cart page.
You can change the button text and other styling of the default Checkout button.
4. To customize the purchase information, navigate to the Order Confirmation page.
The Order Confirmation and Checkout Summary components are provided. To choose which costs to display to buyers, click the **Checkout Summary** component.

SEE ALSO:

[Lightning B2B Commerce Checkout Flow](#)

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce

EDITIONS

Available in: Lightning Experience and Salesforce mobile app


Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce


Customize Your Checkout Flow for a B2B Store (Aura)

You can use the default subflows as is or modify them. Fully customize your checkout by removing, adding, and reordering steps or exchanging part of a default subflow with a custom subflow. If you have a B2B store built with the LWR template, you don't need to install a checkout flow.

To support browser refresh and asynchronous background operations, a core loop and decision element drives the flow. Each subflow contains a `currentState` and a `nextState` variable. If the `nextState` variable doesn't accurately reflect the next subflow, the flow can't continue, and the checkout hangs. If you delete or reorder subflows, make sure to update the `nextState` variable to the correct state value.

 **Note:** The default checkout flow doesn't show a Previous button during checkout. Instead, the flow references the checkout state variable to determine which screen to show or which integration to run. If you customize the default flow to add your own Previous button, ensure that the button resets to the checkout state that corresponds to the screen shown and doesn't revert to the previous checkout state. For example, if an integration runs between screens, reverting only to the previous checkout state can result in undefined behavior or errors.

1. To replace an existing subflow with a custom subflow, drag a new subflow element onto your flow canvas.

 **Note:** We recommend that you keep the Shipping Address subflow first and the Payments subflow at the end. The Shipping Address subflow determines the information related to shipping that the rest of the flow requires. Ending with the Payments subflow minimizes the number of unused payment authorizations on the payment gateway.

2. Enter or search for the type of subflow that you want to add. For example, Shipping Address.

3. For the `nextState` and `cartId` input values, select **Include**.

4. Under `cartId`, add `{ !cartId }`. This variable represents the ID value of the current cart.


5. Under `nextState`, add the subflow that comes next.

For example, if you replace the Shipping Address subflow and you want inventory to come next like it does in the default flow, select **Inventory**.

6. Delete the subflow you want to replace.

7. On the Main Decision Hub element, drag the connector to your new subflow, and then drag the connector on your new subflow to the subflow that follows.

8. Save and activate your flow.

 **Note:** To complete your checkout flow, you create Apex classes for pricing, tax, shipping, and inventory. The flow works with integrations but fails without Apex classes. For information about creating Apex classes and customizing your flow, see [Lightning B2B Commerce Checkout Flow](#).

The `nextState` variable is a string associated with `CheckoutStateEnum`. Some of these values include:

- Payment Info
- Shipping Address
- Order Summary
- Cart To Order
- Activate Order
- Order Confirmation
- Entitlements

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce

- Taxes
- Error
- Complete
- Shipment
- Inventory
- Repricing
- Billing Address
- Delivery Method

SEE ALSO:

[Lightning B2B Commerce Checkout Flow](#)

Store Search

Get the most out of your store by helping shoppers find what they're looking for.

[Considerations for Product Searchability](#)

As you configure search for your storefront, keep these considerations in mind.

[Controlling Search, Facet, and Display Behavior for Fields](#)

Standard fields and custom field types have characteristics that affect whether you can control the behavior of search, facet, and display.

[Mark Products as Searchable or Not Searchable](#)

After you build your initial search index, all products in a catalog are searchable by default. If you want to make a product not searchable, you can exclude it from search. You can change whether a product is searchable at any time.

[Mark Product Fields as Searchable](#)

Product fields are consistent from product to product. For example, each product has a field for Product Name, Product Description, and Product Image. By default, some product fields are marked as searchable.

[Add Product Search Filters \(Facets\)](#)

Filters—also called facets—enable buyers and shoppers to narrow their search results. You can create filters from product fields, such as size, finish, and color. A filter can also include selectable values. For example, a color filter can have the values red, blue, and green. If a filter has values, they appear on the results page under the parent filter.

[Configure How to Display Search Results](#)

Define how many values appear for each search filter and how many search results to show on a page. You can choose to skip additional entitlement checks, automatically select and display relevant facets, and group search results under parent products.

[Sort Options](#)

Add and modify sort rules to let customers arrange results in search and category pages. You can create rules from available products and product attributes and define how these rules appear to customers.

[Commerce Search Index](#)

The search index makes products in your store searchable. Rebuild the search index after making updates to your store so that the changes are reflected for your customers.

[Set Up Einstein Search Suggestions](#)

With Einstein search suggestions, customers see relevant search terms before they finish entering their own. Relevance is based on a customer's recent search history and the popular search terms that were used by similar customers. Customers see search suggestions when they click the Search field and as they enter a search term. Search suggestions appear below the Search field.

[AI-Powered Search for Commerce](#)

Harness the power of AI to improve store search experiences with the Einstein semantic search feature. Einstein semantic search uses natural language processing to interpret queries and return relevant results that account for synonyms, alternative spellings, abbreviations, typos, and more. This custom-built AI algorithm works behind the scenes by training on your storefront activity data.

[Manage No Search Results](#)

Manage how buyers are redirected or alerted when their search yields no results. If you have a B2B or B2C store that uses the LWR template, use the No Results Layout component to display a no results message.

Considerations for Product Searchability

As you configure search for your storefront, keep these considerations in mind.

[Before You Begin](#)

Other features in your store and in your Salesforce org can affect whether a product is discoverable.

[Commerce Administrator Considerations for Product Searchability](#)

Commerce administrators must ensure that certain conditions are met to search for products in storefronts.

[Commerce Search and Auto-Correction Management](#)


Auto-correction, or typo tolerance, helps customers find the products that they're looking for when they inadvertently enter incorrect search terms. Typo tolerance corrects suggestions by matching and returning terms similar to those entered in a query. For example, if a customer mistypes shert in the search bar of a site that sells apparel, typo tolerance can suggest terms like shirt.

Before You Begin

Other features in your store and in your Salesforce org can affect whether a product is discoverable.

As part of the import process, or after the import is complete, make sure these conditions are met.

- All products in your store are associated with a category.
- All categories are associated with the store catalog.
- The catalog is associated with the store.

 **Important:** If a shopper searches for a product that isn't in the store's catalog, the search returns an empty page.

Also review the requirements in this table.

Requirement	More Information
Confirm that your products are marked searchable and active.	Mark Products as Searchable on page 122
Make sure that the product fields that you want included in search results are marked as searchable.	Mark Product Fields as Searchable on page 123

EDITIONS

Available in: **Lightning Experience** and **Salesforce mobile app**

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: **B2B Commerce and D2C Commerce**

Ensure that shoppers have CRUD read access to products and to the catalog.	Create Permission Sets for Shoppers on page 11
Check Field-Level Security (FLS) restrictions on searchable or filterable product fields to ensure no shopper limitations.	Field-Level Security
Build your search index to include the latest catalog updates.	Build the Search Index on page 131

SEE ALSO:


- [Commerce Administrator Considerations for Product Searchability](#)
- [Rebuild the Commerce Search Index](#)

Commerce Administrator Considerations for Product Searchability

Commerce administrators must ensure that certain conditions are met to search for products in storefronts.

To search for a product in B2B or B2C stores, buyers and shoppers must have:

- CRUD read access to the product and catalog
- Entitlement to view the product
- Field-level security (FLS) access to all product fields that are configured for search

 **Important:** To ensure buyers and shoppers can view search results, don't use FLS restrictions on indexed product or catalog fields.

Use FLS to control access to the information in object fields through profiles, permission sets, or from the field itself. Product fields respect your Salesforce FLS settings, which affect whether a product or the information in a product field is discoverable. Using FLS to restrict a shopper's access to a field that's searchable or filterable prevents that shopper from conducting a search.

For more information, see [Field-Level Security](#).

- Access to all indexed fields

Regardless if one or many product fields are indexed, if a shopper can't access one indexed field, the shopper can't search your store.

Search returns results only for a full token match—when all search terms are present in a result. Partial token matching, like prefix and infix searches, isn't enabled. But stemming is enabled. So search results list all matches to a word's stem—for example, "coffee" finds coffees, and "run" returns runner, running, and so on.

Search Considerations for Product Entitlements in B2B Stores

In Experience Builder, many components are available to you for building your store. The components that were developed specifically for B2B Commerce store environments respect user entitlements. When buyers view products through a component, such as Results Layout, they see only those products that they're entitled to see.

For a B2B store, if you want buyers and guest users to see only categories that have entitled products, contact Salesforce customer support to enable this functionality. If a category has no entitled products, it also doesn't appear in the storefront. To view a category or its descendent categories, it must have entitlement to at least one product within the category. Rebuild your search index for any category changes to take effect. The Account Selector option isn't available with this feature.

EDITIONS

Available in: **Lightning Experience** and **Salesforce mobile app**

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: **B2B Commerce and D2C Commerce**

Some components don't respect entitlements, so use caution when introducing them to your store. For example, be cautious with the CMS Collections component. All users can see any product that you expose through this component, whether the user is a guest, entitled, or unentitled. The same is true for a Product Record List. For the Record List component, we advise not using it in your store.

Another component to be cautious of is Global Search. When you configure the types of results it can return, don't include Products objects. However, the Results Layout component respects user entitlements, so use it for product searches. For searches for things like cases, articles, and feeds, you can use Global Search.

Search Results Limits

To achieve the highest performance, the Commerce Search engine limits search results returned and displayed to the most relevant 10,000 products for each search query, even if there are more results. For example, if a query matches 20,000 results, Commerce Search will still show 10,000 results. When a customer modifies existing search results using sorting options or filters, Commerce Search uses the updated criteria to search all products again before showing the new results.

In addition, for pages using the Results Layout component, Commerce Search shows only up to 5,000 additional results after the first results page, even if there are more results. For example, say you set the results per page to 20, and a search request results in 10,000 products. Commerce Search orders the results based on sort settings and displays the first page of 20 results. It then provides 250 additional pages of 20 products each for a total of 5,020 viewable results. By comparison, if you set the results per page to the maximum setting of 200, the first page shows 200 results. Commerce Search then provides 25 more pages of 200 products each for a total of 5,200 viewable results.

Commerce Search shows the most relevant results for any sort or filter settings. To view more results, customers can use sorting options to reorder output or use filter values to refine their search.

Search Results Count Approximation


To improve search performance on queries with a large number of results, displayed product and facet counts are approximated. When a search reaches this high threshold of results, computing the exact value slows performance and customers generally only need an approximation. To keep results counts lower, consider modifying catalog size, category structure, and filterable attribute value distribution.

Search Considerations for Promotions in B2B Stores

Promotion tier pricing isn't reflected in prices on the Search Results page. However, promotional pricing is reflected on other pages, such as the Product Details and Cart pages.

 **Note:** Promotions aren't currently supported for B2C stores.

Troubleshoot Translation and Localization Issues in B2B Stores

 **Note:** Translation and localization aren't currently supported for B2C stores.

Issue	Resolution
Stemming isn't working as expected. For example, different results appear when searching for "glove," "gloves," and "glove's."	Go to Setup > Company Information and enable Data Translations.
Searching in a different language doesn't yield results.	Add the org default language as a supported language in your store. For example, if your org default language is English, add English as a supported language in your store (and provide English translations of product field values).

Issue	Resolution
	To see the results, search your store as a user in the org default language.
After marking fields as filterable and rebuilding the search index, the filters don't appear in the store.	Go to Setup > Company Information and enable Data Translations.
After adding a language and setting the user's language to it, an error occurs when navigating to a category.	Rebuild your search index on page 131 when you add new languages or translations to your store or product catalog.
Picklist values don't appear in the search results after creating a store in a different language than the org.	Make sure to provide translated values to your picklist if your store uses a different language than the default language of your org.

SEE ALSO:

[Before You Begin](#)[Rebuild the Commerce Search Index](#)

Commerce Search and Auto-Correction Management

Auto-correction, or typo tolerance, helps customers find the products that they're looking for when they inadvertently enter incorrect search terms. Typo tolerance corrects suggestions by matching and returning terms similar to those entered in a query. For example, if a customer mistypes shirt in the search bar of a site that sells apparel, typo tolerance can suggest terms like shirt.

Typo correction is enabled by default for Commerce Search, but it's executed as a secondary search function. The secondary search updates the search phrase to include candidate corrections and then repeats the search. You can't disable typo tolerance.

When a customer initiates a search:

- The initial filter and search phrase execution occur simultaneously, and then Commerce Search determines if the term exists in the catalog.
- If Commerce Search finds the original search term, it returns the results.
- If no results for a term are found, Commerce Search internally initiates a typo correction search and finds the closest match to the original term in the catalog.
- Using the corrected term, Commerce Search runs the search again and returns any results.
- If a user begins a query with sku: or SKU: and includes one or more SKUs, Commerce Search returns results matched by the SKU field, Product Name, and Product Code. If the inputs are separated by white space, multiple SKU search is supported. Typo tolerance isn't used when a user enters a SKU search.

Keep these considerations in mind for Commerce Search, typo tolerance, auto-correction, and Einstein Search suggestions.

- Partial term matching, such as prefix search, isn't supported.
- Stemming is supported. Commerce Search delivers results for any matches to a word's stem, for example, coffees finds coffee and running returns run.
- Commerce Search provides typo tolerance and auto-correction only when it finds terms that differ by one or two letters or numbers from the original term. For example, searching for coff results in the corrected term coffee. But searching for cof provides no results because it takes more than two letter corrections to reach coffee.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

- Typo tolerance looks for the closest match within two corrections of the original term that returns results.
- Typo tolerance applies to tokens with three or more characters. For example, if a customer query for XY-1234 doesn't return an exact match, typo tolerance searches for the closest match to the second token, 1234, but not the first, XY.
- Typo tolerance looks for replacement terms before filters or entitlements are applied so can match a product that is later removed from results. Typo tolerance thus doesn't guarantee a specific replacement for a misspelled or not found term, even when candidate terms are within the two correction distance.
- Search uses the exact one or two correction distance from the original term only when looking for corrections in non-localized terms.
- When searching localized terms, the original term is first analyzed using regular search functions. Depending on the localization language, analysis can include stemming searched terms and potential corrections, resulting in terms of shorter length.
- If a localized, misspelled term can't be properly stemmed, the distance between the term and the stem of its corrected spelling can be greater than two corrections. This scenario can result in some longer misspelled words not getting corrected.
- Einstein Search suggestion uses different algorithms from Commerce Search typo tolerance or auto-correction. Einstein Search suggests type-ahead options only after the site builds up enough search history to use as a reference input.

SEE ALSO:

[Considerations for Product Searchability](#)

Controlling Search, Facet, and Display Behavior for Fields

Standard fields and custom field types have characteristics that affect whether you can control the behavior of search, facet, and display.

[How Behaviors Are Controlled](#)

Products in your store are based on a data object named Product2. This object serves as a template for all store products. You use the Product2 object to control search, facet, and display behavior.

[Product Standard Fields](#)

Different standard field types can have different characteristics. These characteristics affect whether you can control a field's search, facet, and display behavior.

[Product Custom Fields](#)

Custom field types can have different characteristics. These characteristics affect whether you can control the field's search, facet, and display behavior.

[Modify or Remove Custom Fields](#)

To ensure that Search works properly, make sure to mark the field as unsearchable before changing its name or removing it.

How Behaviors Are Controlled

Products in your store are based on a data object named Product2. This object serves as a template for all store products. You use the Product2 object to control search, facet, and display behavior.

All Product2 fields are available to all products in your store. If you add custom fields to the Product2 object, those fields are also available to all store products.

The behavior you choose to control affects how you can use each entity.

Controlling...	Affects...
Search behavior	Whether you can make an entity discoverable in search
Facet behavior	Whether you can use an entity as a search filter
Display behavior	Whether you can show or hide an entity

SEE ALSO:

[Product Standard Fields](#)

[Product Custom Fields](#)

[Rebuild the Commerce Search Index](#)

Product Standard Fields

Different standard field types can have different characteristics. These characteristics affect whether you can control a field's search, facet, and display behavior.

This table lists the different Product standard fields and which behaviors—search, facet, and display—you can control.

Standard Field Name	Field Label	Controllable Behavior		
		Search	Facet	Display
CurrencyIsoCode	Product Currency	✔	✔	✔
Description	Product Description	✔		✔
DisplayUrl	Display URL	✔		✔
Family	Product Family	✔	✔	✔
Name	Product Name			

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited,** and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited,** and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Standard Field Name	Field Label	Controllable Behavior		
		Search	Facet	Display
		✓		✓
ProductCode	Product Code	✓		✓
QuantityUnitOfMeasure	Quantity Unit of Measure	✓	✓	✓
StockKeepingUnit	Product SKU	✓		✓

SEE ALSO:

[How Behaviors Are Controlled](#)

[Product Custom Fields](#)

[Rebuild the Commerce Search Index](#)

Product Custom Fields

Custom field types can have different characteristics. These characteristics affect whether you can control the field's search, facet, and display behavior.

This table lists the different Product custom field types and which behaviors—search, facet, and display—you can control.

Custom Field Type	Controllable Behavior		
	Search	Facet	Display
Formula			✓
Lookup Relationship			✓
External Lookup Relationship			✓
Checkbox			✓

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

Custom Field Type	Controllable Behavior		
	Search	Facet	Display
Currency			✓
Date			✓
Date/Time			✓
Email	✓		✓
Number			✓
Percent	✓		✓
Phone	✓		✓
Picklist	✓	✓	✓
Picklist (Multi-Select)	✓	✓	✓
Text	✓		✓
Text Area	✓		✓
Text Area (Long)	✓		✓
Time			

Custom Field Type	Controllable Behavior		
	Search	Facet	Display
			✓
URL	✓		✓

SEE ALSO:

[How Behaviors Are Controlled](#)

[Product Standard Fields](#)

[Rebuild the Commerce Search Index](#)

Modify or Remove Custom Fields

To ensure that Search works properly, make sure to mark the field as unsearchable before changing its name or removing it.

1. Before renaming or removing a custom field, mark it as unsearchable.
2. Remove the field.
If you're only removing the field, go to step 5. If you're renaming the field, continue to the next step.
3. Create a custom field with the new name.
4. Mark the new custom field as searchable.
5. Rebuild the index.

SEE ALSO:

[How Behaviors Are Controlled](#)

[Mark Product Fields as Searchable](#)

Mark Products as Searchable or Not Searchable

After you build your initial search index, all products in a catalog are searchable by default. If you want to make a product not searchable, you can exclude it from search. You can change whether a product is searchable at any time.

When marking products as searchable or not searchable, keep the following in mind.

- For a product to be searchable, it must also be active.
Each Product Workspace has an Active column. When Active is selected, the product is visible in all the associated stores. For information about changing a product's active state, see [Use the Product Workspace to Manage and Update Products](#).

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

- You mark a product's search status for individual stores. You can mark a product searchable in one store and make it not searchable in another store.
 - Marking a product as not searchable prevents it from being returned in search results. However, as long as a product is active, it appears in all the associated stores, even if it's not searchable.
1. On the Commerce App navigation menu, select **Product Workspace**.
 2. Click the product name that you want to mark as searchable or unsearchable.
 3. In the product page, click the product's **Stores** tab.
 4. For the stores that you want to change, click the row actions menu icon.
 - To let shoppers with access find the product in a search, select **Mark as Searchable**.
 - To prevent shoppers from finding the product in a search, select **Mark as Not Searchable**.

SEE ALSO:

[Mark Product Fields as Searchable](#)

[Add Product Search Filters \(Facets\)](#)

[Configure How to Display Search Results](#)


Mark Product Fields as Searchable

Product fields are consistent from product to product. For example, each product has a field for Product Name, Product Description, and Product Image. By default, some product fields are marked as searchable.

In addition to the default searchable fields, you can mark additional standard and custom fields as searchable. Content in marked fields is then indexed for use by the search engine. You can also choose to not mark a field as searchable, for example, if the field contains sensitive information or it provides generic data.

When marking product fields as searchable, keep these considerations in mind.

- A product can have up to 25 searchable fields or other attributes. More than 25 interferes with search index rebuilds.
- Commerce Search limits the number of searchable values that you can configure. You can configure individual maximums of 25 searchable fields, 50 results filters, and 10 sortable fields but only up to a combined maximum of 70 values. For example, you can configure 20 searchable fields, 40 results filters, and 10 sortable fields, or any combination totaling 70.
- With product variations, parent products and their fields aren't searchable.
- When using picklists, make sure to activate any picklist values before building search indexes.
- The Category Name, Product Name, SKU, Product Description, and Product Code fields are searchable by default. Besides SKU and Product Code, these fields can be changed to not searchable. SKU and Product Code remain searchable even if marked not searchable because they're used as identifiers for SKU searches.

 **Tip:** If you use field encryption, we recommend not encrypting product fields because that makes them not searchable. You can mark encrypted product fields as searchable, but encryption overrides the setting and they remain unsearchable.

1. On your store's home page, click the **Search** tile.
2. Click **Searchable Fields**.
3. Click **Manage Searchable Fields**.



EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

4. In the Manage Searchable Fields window:

- To mark a field as searchable, click .
- To make a field not searchable, click .

5. Click **Save**.



Note: Changes appear in the store after the next search index rebuild. For more information, see [Build or Rebuild the Search Index](#) on page 131.

SEE ALSO:

[Mark Products as Searchable or Not Searchable](#)

[Add Product Search Filters \(Facets\)](#)

[Configure How to Display Search Results](#)

[Deactivate and Reactivate Values](#)

Add Product Search Filters (Facets)

Filters—also called facets—enable buyers and shoppers to narrow their search results. You can create filters from product fields, such as size, finish, and color. A filter can also include selectable values. For example, a color filter can have the values red, blue, and green. If a filter has values, they appear on the results page under the parent filter.

When adding product filters, keep these considerations in mind.

- Search can use up to 50 product fields as possible filters.
- Category is the only default field. It's always included as a filter option, and you can't remove it. You can select up to 49 other fields.
- Commerce Search limits the number of searchable values that you can configure. You can configure individual maximums of 25 searchable fields, 50 results filters, and 10 sortable fields but only up to a combined maximum of 70 values. For example, you can configure 20 searchable fields, 40 results filters, and 10 sortable fields, or any combination totaling 70.
- The use of HTML rich-text is not supported when creating picklist values.
- Field-level security settings aren't applied to filters. Only add filters that you want shoppers to use.

Search shows up to 10 facets for search results. By default, these facets include the Category field and the first nine fields in the order that they appear in the Selected Fields column. However, if you choose to automatically select the 10 most-relevant facets, the order in the Selected Fields column is ignored. Instead, based on their relevance to the search results, nine fields are selected from the Selected Fields column and used as facets along with Category.



Note: Make sure to rebuild the index after adding or removing fields in the Selected Fields column.


1. On your store's home page, click the **Search** tile.
2. On the Results Filters tab, click **Manage Filters**.
3. In the Available Fields column, move up to 49 filters to the **Selected Fields** column.
4. To change the display order of the filters, select a filter in the right column and use the up and down arrows to move the filter. If you choose to automatically select the 10 most-relevant facets, the order in the Selected Fields column is ignored.
5. Save your changes, and on the Search Index Summary tab, rebuild the index.

EDITIONS

Available in: **Lightning Experience** and **Salesforce mobile app**

Available in: **Enterprise, Unlimited,** and **Developer Editions**

Available in: **B2B Commerce** and **D2C Commerce**

 **Important:** For B2B stores, we recommend that you localize all filter values, such as red, blue, and green on a color filter. By localizing the values, you ensure that all filters appear as expected. For more information about translation and localization, see [Sell Globally](#) on page 211.

SEE ALSO:

[Mark Products as Searchable or Not Searchable](#)

[Mark Product Fields as Searchable](#)

[Configure How to Display Search Results](#)

[Automatically Select the Most Relevant Facets](#)

Configure How to Display Search Results

Define how many values appear for each search filter and how many search results to show on a page. You can choose to skip additional entitlement checks, automatically select and display relevant facets, and group search results under parent products.

[Set the Maximum Number of Results per Page](#)

You can limit the number of products that appear per page on Search Results and Category Detail pages.

[Reduce Entitlement Checks for Faster Results](#)

User entitlement checks are run as part of a search index rebuild and also when retrieving search results. Though applying both entitlement checks ensures the most accurate information is provided in Search query results, you can get faster search performance by skipping the second entitlement check.

[Select a Price Book for Sort](#)

To arrange search results by price, select a price book for sort to use. The price book you select is always used for sort, regardless of whether a customer is assigned to a different price book based on buyer group or entitlement policy. Price book entries for deleted, archived, or inactive products aren't returned in search results. Results are sorted and returned based on the store's default currency.

[Automatically Select the Most Relevant Facets](#)

Automatically select, order, and display the default Category facet and the most relevant facets from the Selected Fields column based on search results.

[Set the Maximum Number of Values per Facet](#)

On Category Detail and Search Results pages, facets can have values that buyers use to further narrow the products that are returned. For example, a facet like "shoes" can have values like "women," "men," and "children." You can specify the number of values that a facet can have.

Set the Maximum Number of Results per Page

You can limit the number of products that appear per page on Search Results and Category Detail pages.

1. On your store's home page, click the **Search** tile.
2. Click the **Results Display Settings** tab.
3. In the Results Display Settings section, click the pencil next to Results per Page, and enter a number from 1 to 100.
4. Save your changes.
It can take up to 2 minutes for the search page to reflect the change.

SEE ALSO:

- [Configure How to Display Search Results](#)
- [Mark Products as Searchable or Not Searchable](#)
- [Mark Product Fields as Searchable](#)
- [Add Product Search Filters \(Facets\)](#)
- [Adjust Search Settings for Product Variation Grouping](#)

Reduce Entitlement Checks for Faster Results

User entitlement checks are run as part of a search index rebuild and also when retrieving search results. Though applying both entitlement checks ensures the most accurate information is provided in Search query results, you can get faster search performance by skipping the second entitlement check.

1. On your store's home page, click the **Search** tile.
2. Click the **Results Display Settings** tab.
3. In the Results Display Settings section, click the pencil next to Skip additional entitlement check for search, and select the checkbox.
4. Save your changes.

After disabling the second entitlement check, rebuild the Search index to ensure that the data is up to date. Changing entitlements and not rebuilding the search index results in mismatched data and can produce inaccurate results.

SEE ALSO:

- [Configure How to Display Search Results](#)
- [Mark Products as Searchable or Not Searchable](#)
- [Mark Product Fields as Searchable](#)
- [Add Product Search Filters \(Facets\)](#)
- [Rebuild the Commerce Search Index](#)
- [Adjust Search Settings for Product Variation Grouping](#)

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited,** and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited,** and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Select a Price Book for Sort

To arrange search results by price, select a price book for sort to use. The price book you select is always used for sort, regardless of whether a customer is assigned to a different price book based on buyer group or entitlement policy. Price book entries for deleted, archived, or inactive products aren't returned in search results. Results are sorted and returned based on the store's default currency.

1. On your store's home page, click the **Search** tile.
2. Click the **Results Display Settings** tab.
3. In the Results Display Settings section, click the pencil next to Price Book ID.
4. Click in the **Price Book ID** field, and select a price book from the picklist.

The price book must be active and have valid or empty usage dates.

 **Note:** Using a price sort rule, without first selecting a price book, results in an error message.

5. Save your changes.

SEE ALSO:

- [Configure How to Display Search Results](#)
- [Pricing for Commerce Stores](#)
- [Mark Products as Searchable or Not Searchable](#)
- [Rebuild the Commerce Search Index](#)
- [Configure Store Language, Currency, and Tax](#)
- [Adjust Search Settings for Product Variation Grouping](#)

Automatically Select the Most Relevant Facets

Automatically select, order, and display the default Category facet and the most relevant facets from the Selected Fields column based on search results.

1. On your store's home page, click the **Search** tile.
2. Click the **Results Display Settings** tab.
3. Under Filters and Facets, click the pencil next to Autoselect the most relevant facets, and select the checkbox.
4. Save your changes.

SEE ALSO:

- [Configure How to Display Search Results](#)
- [Mark Products as Searchable or Not Searchable](#)
- [Mark Product Fields as Searchable](#)
- [Add Product Search Filters \(Facets\)](#)
- [Adjust Search Settings for Product Variation Grouping](#)

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

Set the Maximum Number of Values per Facet

On Category Detail and Search Results pages, facets can have values that buyers use to further narrow the products that are returned. For example, a facet like “shoes” can have values like “women,” “men,” and “children.” You can specify the number of values that a facet can have.

1. On your store’s home page, click the **Search** tile.
2. Click the **Results Display Settings** tab.
3. Under Filters and Facets, click the pencil next to Maximum Values per Filter, and enter a number from 1 to 100.
4. Save your changes.
It can take up to 2 minutes for the search page to reflect the change.

SEE ALSO:

- [Configure How to Display Search Results](#)
- [Mark Products as Searchable or Not Searchable](#)
- [Mark Product Fields as Searchable](#)
- [Add Product Search Filters \(Facets\)](#)
- [Adjust Search Settings for Product Variation Grouping](#)

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

Sort Options

Add and modify sort rules to let customers arrange results in search and category pages. You can create rules from available products and product attributes and define how these rules appear to customers.

[Enable or Disable Sort for Search Results](#)

Sorting is enabled for search and category pages by default. However, you can control whether customers can see the sorting menu that appears on these pages with the Results Layout component. You can change the sorting properties on any page that uses the Results Layout component.

[Add a Sort Rule](#)

Create a sort rule based on available products and product attributes to let customers arrange results in search and category pages.

[Edit or Delete a Sort Rule](#)

You can edit a sort rule and change where it appears in the sorting menu. To remove a sort rule from the sorting menu, delete the rule.

Enable or Disable Sort for Search Results

Sorting is enabled for search and category pages by default. However, you can control whether customers can see the sorting menu that appears on these pages with the Results Layout component. You can change the sorting properties on any page that uses the Results Layout component.

Because each instance of the Results Layout component is unique, set properties on each instance separately.

1. In Experience Builder, open the Category Detail or Search Results page.
2. Select the **Results Layout** component.
3. In the Sorting Menu section:
 - To enable sorting, select **Show sorting menu**.
 - To disable sorting, deselect **Show sorting menu**.

4. Publish the store.

The sorting menu appears only when a search returns results. The selected sorting option remains enabled for the current search results, unless you change it. When you issue another search request, the sorting option reverts to the first sort option in the sorting menu.

SEE ALSO:

[Add a Sort Rule](#)

[Edit or Delete a Sort Rule](#)

Add a Sort Rule

Create a sort rule based on available products and product attributes to let customers arrange results in search and category pages.

When creating a sort rule, keep these considerations in mind.

- The default Best Match rule sorts output based on its relevance to the search results. Commerce Search uses the frequency of the search terms in each product and how often each term appears in the catalog to determine the sort order for the search output.
 - You can't delete the default Best Match rule, but you change the order in which it appears in the sort menu.
 - Commerce Search limits the number of searchable values that you can configure. You can configure up to 25 searchable fields, 50 results filters, or 10 sortable fields, but the combined maximum is 70 values. For example, you can configure 20 searchable fields, 40 results filters, and 10 sortable fields, or any combination totaling 70.
 - Sort rules apply to simple products and variation child products. When your store's results display settings are set to Group Variations Under Parent, product variation groups can appear out of order in sorted search results. Commerce Search applies sort rules to the most relevant child product within a variation group, and search results return the variation parent product.
1. On your store's home page, click the **Search** tile.
 2. Click **Sort Rules**.
 3. Click **New**.
 4. In the New sort option window, select the product field name to use as a sort option.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

Before sorting results by price, select a price book on the Search tile's Results Display Settings tab.

 **Note:** You can't delete custom fields that you use to create sorting rules. To delete a custom field, first delete the sorting rule that uses that field.

5. Select an ascending or descending sort order.
Values in the Sort Order Label menu change to reflect your sort order selection.
6. (Optional) Select a sort order label to append to the sort option in the sorting menu.
The sort order label appears in parentheses after the product field name. This label can help clarify how sorting occurs, for example, alphabetically, numerically, by cost, or the size of a product.
7. (Optional) Specify where the new rule appears in the sort menu.
By default, a new sort option is added to the end of the menu. You can override this placement by changing its numerical menu position. Until a shopper or buyer selects a different rule, sort order follows the first sort rule in the sort menu.
8. Click **Save**.
9. Rebuild the search index.

SEE ALSO:

[Enable or Disable Sort for Search Results](#)

[Edit or Delete a Sort Rule](#)

[Select a Price Book for Sort](#)

Edit or Delete a Sort Rule

You can edit a sort rule and change where it appears in the sorting menu. To remove a sort rule from the sorting menu, delete the rule.

1. On your store's home page, click the **Search** tile.
2. Click **Sort Rules**.
3. For the sort rule that you want to edit, click the actions dropdown menu in the rightmost column of the table.
4. Click **Edit**.
5. In the Edit sort option window, you can change these parameters.

Parameter	Description
Product Field Name	Product or attribute value to use for the sort rule.
Sort Order	Choice of Ascending or Descending.
Sort Order Label	Optional label to help clarify how sorting occurs. For example, alphabetically, numerically, by cost, the size of a product, and so on.
Sort Menu Order	Numerical position where the sort option appears in the menu.

6. Click **Save**.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

7. Rebuild the search index.

SEE ALSO:

[Enable or Disable Sort for Search Results](#)

[Add a Sort Rule](#)

Commerce Search Index

The search index makes products in your store searchable. Rebuild the search index after making updates to your store so that the changes are reflected for your customers.

[Rebuild the Commerce Search Index](#)

Rebuilding a search index enables shoppers to see changes or updates to products in their search results or on Product grid pages. We recommend building your search index before you activate your store.

[Commerce Search Index Management](#)

Build your search index before you activate your store, and rebuild the index when you make changes to your store.

Rebuild the Commerce Search Index

Rebuilding a search index enables shoppers to see changes or updates to products in their search results or on Product grid pages. We recommend building your search index before you activate your store.

1. On your store's home page, click the **Search** tile.
2. Click **Search Index Summary**.
3. Select an indexing method. If your store has changes not supported by the Partial Reindex method, only the Full Reindex method is available. If you change any product bundles, product sets, or translations for picklist values used as search attributes, use the Full Reindex method to capture changes even if the Partial Reindex method is available.
4. Click **Rebuild Index**.

After the build completes, your changes appear in the active store. A record of the index build populates the Index Log on the Search Index Summary page. This record indicates the index type, number of updated products, completion status, user who initiated the build, start time of the build, and total time elapsed.

SEE ALSO:

[Commerce Search Index Management](#)

[Considerations for Product Searchability](#)

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited,** and **Developer Editions**

Available in: B2B Commerce and D2C Commerce

Commerce Search Index Management

Build your search index before you activate your store, and rebuild the index when you make changes to your store.

Important: To conserve resources, storefront indexes that have no search activity for 60 consecutive days are deleted. To reactivate search, you must rebuild the index.

When building the search index, keep these considerations in mind.

- Partial reindexing saves time by only updating information in the index that has changed, instead of rebuilding the entire index. Changes that can be published with the Partial Reindex method include changing or removing products, catalogs, assignment categories, and entitlements.
- Use the Full Reindex method after creating a store, updating 2,000 or more products, or making structural modifications such as changing searchable fields, results filters, or sort rules. If you change any translations for picklist values used as search attributes, use the Full Reindex method to capture changes even if the Partial Reindex method is available.
- You can rebuild the search index a combined maximum of 60 times per hour for all storefronts in an org. An error message occurs if you exceed this hourly rate limit.
- Wait at least 5 minutes between index rebuilds for an individual storefront. Rebuilding indexes too quickly results in an error message.
- We strongly recommend rebuilding a search index for an individual storefront no more than five times per hour.
- The search index supports a limited number of attributes based on the number of locales used in your store. If you exceed this limit, rebuilding the index results in an error message. Reduce the number of attributes or supported locales in your store and try again.
- Making certain changes or adding products requires that you rebuild your index. Changes that require rebuilding the store search index include changing or removing:
 - Which product or product attribute fields are searchable or filterable
 - Values of product fields marked as searchable or filterable
 - Products in the store’s catalog
 - Product translations in the store’s catalog
 - Categories or the category hierarchy structure
 - Category names
 - Translations of category names
 - Languages in a store or catalog
 - Language translations for a store or catalog
 - Products in an entitlement policy
 - Product variation grouping
 - Sorting rules
 - Geolocation of your organization
 - Names of custom fields on the Product2 object

SEE ALSO:

[Rebuild the Commerce Search Index](#)

[Mark Products as Searchable or Not Searchable](#)

[Mark Product Fields as Searchable](#)

EDITIONS

Available in: **Lightning Experience**

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: **B2B Commerce and D2C Commerce**

Set Up Einstein Search Suggestions

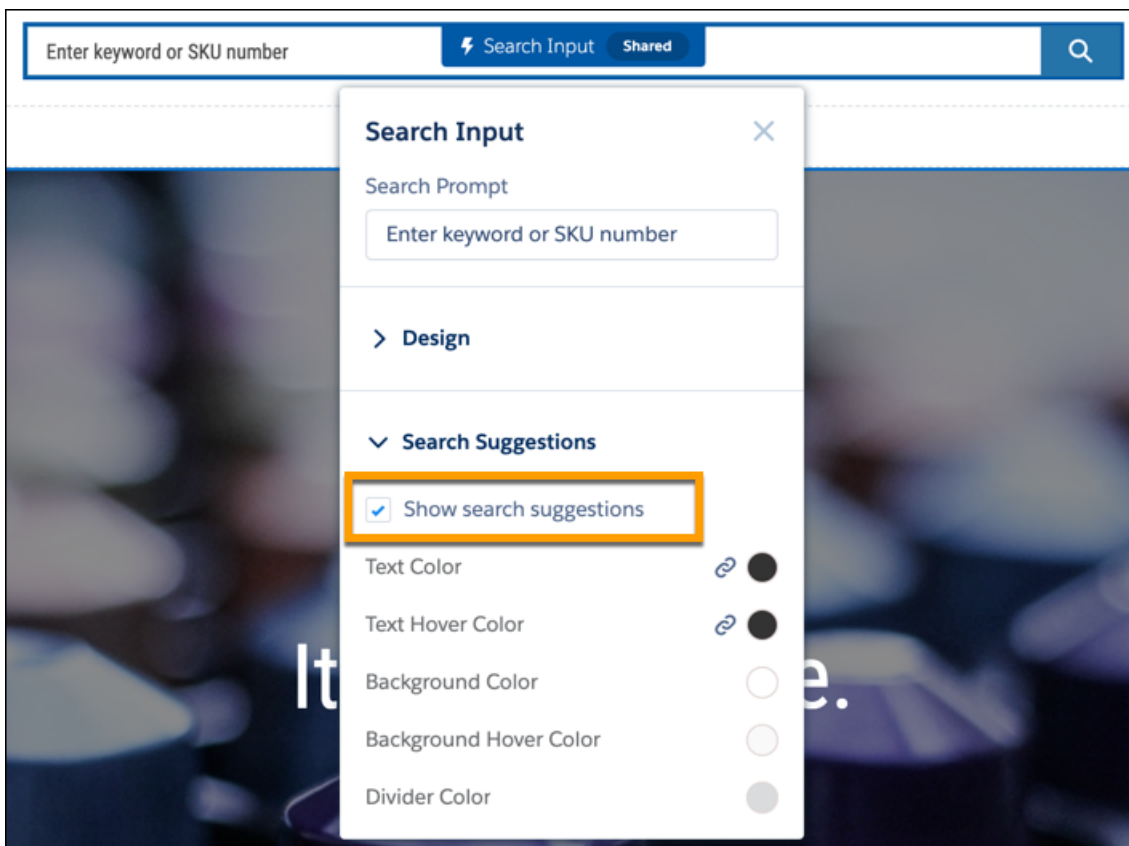
With Einstein search suggestions, customers see relevant search terms before they finish entering their own. Relevance is based on a customer's recent search history and the popular search terms that were used by similar customers. Customers see search suggestions when they click the Search field and as they enter a search term. Search suggestions appear below the Search field.

Before you set up Einstein Search Suggestions:

- Deploy Commerce Einstein
 - Enable Storefront Activity Tracking
1. On your store's home page, click the **Experience Builder** tile.
 2. On any page where it appears, select the **Search Input** component. If you're using a B2C store with the Search Bar component, update to the latest B2C Commerce (LWR) template, delete the Commerce Header component, and add a new Commerce Header component to use the Search Input component. For more information, see [Update Your Experience Builder Site's Template](#).

When you configure one Search Input component, the settings apply to all Search Input components in the store.

3. In the Search Suggestions section, select **Show search suggestions**.



EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

- Publish your store.

SEE ALSO:

[Considerations for Product Searchability](#)

[Deploy Commerce Einstein](#)

AI-Powered Search for Commerce

Harness the power of AI to improve store search experiences with the Einstein semantic search feature. Einstein semantic search uses natural language processing to interpret queries and return relevant results that account for synonyms, alternative spellings, abbreviations, typos, and more. This custom-built AI algorithm works behind the scenes by training on your storefront activity data.

Einstein semantic search populates the search results page by matching and returning terms semantically related to a query. This process reduces merchandiser workload by automating tasks such as synonym dictionary management. It also improves conversion rate, reduces occurrences of “no results found” pages, and lowers bounce rate by providing a smoother shopping experience.

With Einstein semantic search, your store is better equipped to handle a range of customer queries.

Use case	Example
Synonyms	<i>Couch and sofa</i>
Alternative spellings	<i>Adapter and adaptor</i>
Abbreviations	<i>AC and Air Conditioner</i>
Slang	<i>Men’s shades</i>
Misspellings	<i>Shert and shirt</i>
Product themes	<i>Wedding gift</i>
Product features	<i>Long USB cable</i>
Product types	<i>Women’s jackets</i>

To activate Einstein semantic search, review the requirements in this table.

Requirement	More information
Your org’s Content Security Policy (CSP) includes the Commerce Einstein domain as a trusted site.	Add a CSP Trusted Site for the Commerce Einstein Domain
You have deployed Commerce Einstein.	Deploy Commerce Einstein
Your storefront allows activity tracking.	Enable Activity Tracking

After you enable Commerce Einstein and storefront activity tracking, the Einstein semantic search algorithm begins training on your store’s data. This training process requires time. Expect improvements in search performance to appear after a week. Einstein semantic search supports training on all languages supported for search results. For a complete list, see [Languages Supported for Search Results](#).


EDITIONS

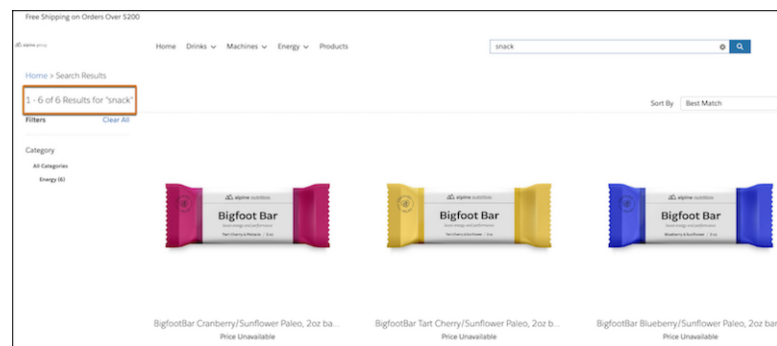
Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

Because each store has unique catalogs and customer behavior, improvements seen from Einstein semantic search vary. For example, gains are especially apparent in a store where customers more frequently search broad terms like *furniture* or *couch* than exact queries, like B2B customers searching product SKUs. For the customer who enters *couch*, Einstein semantic search returns synonyms like *sofa*, potentially improving the relevance of results. By contrast, a product SKU does not have synonyms or alternative spellings, so results are likely be unchanged by Einstein semantic search. In both cases, Einstein semantic search works alongside your store's existing auto-correction management.

 **Example:** With Einstein semantic search, the query *snack* returns results for the semantically similar term *energy bar*.



SEE ALSO:

[Considerations for Product Searchability](#)

[Commerce Search and Auto-Correction Management](#)

[Tracked Data](#)

Manage No Search Results

Manage how buyers are redirected or alerted when their search yields no results. If you have a B2B or B2C store that uses the LWR template, use the No Results Layout component to display a no results message.

[Create a No Search Results Message](#)

If you have a B2B or B2C store that uses the LWR template, use the No Results Layout component to display a message on the search results page when a search yields no results. You can modify this default message in Experience Builder.

[Modify the Default B2B No Search Results Page \(Aura\)](#)

If you have a B2B store that uses the Aura template, when a product search yields no results, buyers are redirected to a no search results page by default. This page contains preloaded content that you can use or modify for your store.

[Create a No Results Page Variation for B2B Product Searches \(Aura\)](#)

If you have a B2B store that uses the Aura template, you can create and modify a new variation for the No Search Results page based on the default page content.


[Add a No Search Results Message to the Search Results Page \(Aura\)](#)

If you have a B2B store that uses the Aura template, you can bypass any No Search Results page redirects by showing a no search results message directly on the search results page.

Create a No Search Results Message

If you have a B2B or B2C store that uses the LWR template, use the No Results Layout component to display a message on the search results page when a search yields no results. You can modify this default message in Experience Builder.

1. In the Commerce App navigation menu, select **Stores**.
2. Select a store.
3. Click on the Experience Builder tile, and open the Search Results page.
4. Select the **Results Layout** component.
5. Delete the Results Layout component and then add the No Results Layout component.
6. Click on the **HTML Editor** component and then click **Edit Markup**.
7. Modify the page content in HTML format and click **Save**. You can change the text, image, and styling of the message.
8. To display a message while search results are loading, drag and drop an HTML Editor component into the Loading State component. Click on **Edit Markup**, modify the page content in HTML format, and then click **Save**.
9. Publish your site.

 **Example:** Here's how the default HTML looks when you publish the page.

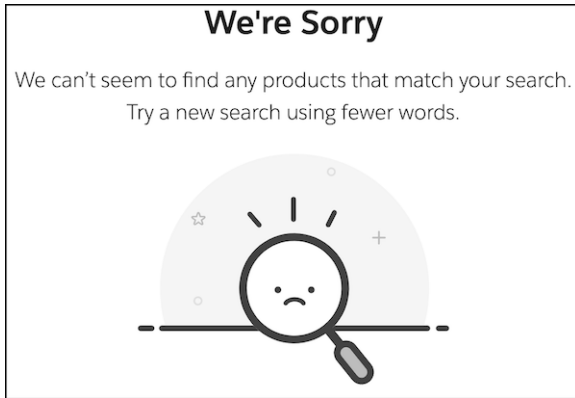
```
<div style="display: flex; flex-direction: column; align-items: center; text-align: center; height: 50vh; justify-content: center;">
  <h1 class="slds-text-heading_large" style="margin-bottom: 20px; font-weight: bold;">We're Sorry</h1>
  <p class="slds-text-heading_small" style="margin-bottom: 5px;">We can't seem to find any products that match your search.</p>
  <p class="slds-text-heading_small">Try a new search using fewer words</p>
  <div style="background: url({!Site.basePath}/assets/images/empty-search.svg) center no-repeat; background-size: contain; margin-top: 25px; height: 200px; width: 50%;"></div>
</div>
```

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce



SEE ALSO:

[Manage No Search Results](#)

[LWR and Aura Store Templates](#)

Modify the Default B2B No Search Results Page (Aura)

If you have a B2B store that uses the Aura template, when a product search yields no results, buyers are redirected to a no search results page by default. This page contains preloaded content that you can use or modify for your store.

1. Open Experience Builder, and then open the No Search Results page.
2. Click the **HTML Editor** component and then click **Edit Markup**.
3. Modify the page content in HTML format.

Here's the default HTML and how it looks when you publish the page. In the first line, the variable `{!term}` is replaced with the search term that the buyer enters.

```
<h1> No results found for "{!term}" </h1><br>
<div class="slds-grid slds-grid--vertical slds-align--absolute-center
slds-text-longform">
  
  <h2 class="slds-text-heading_medium"> Try these search tips instead: </h2>
  <ol class="slds-text-body_regular">
    <li> Check your spelling. </li>
    <li> Search by product type, brand, SKU, or feature. </li>
    <li> Broaden your search using fewer or more general words. </li>
  </ol>
</div>
```

EDITIONS


Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer Editions**

Available in: B2B Commerce and D2C Commerce



4. Click **Save**, and publish the page.

 **Note:** If you prefer not to redirect users to another page, you can show a no-results message directly on the Search Results page.

SEE ALSO:

[Manage No Search Results](#)

[Add a No Search Results Message to the Search Results Page \(Aura\)](#)

Create a No Results Page Variation for B2B Product Searches (Aura)

If you have a B2B store that uses the Aura template, you can create and modify a new variation for the No Search Results page based on the default page content.


1. In Experience Builder, select the **No Search Results** page.
2. On the page tab, click the **Page Properties** gear icon and then click the **Page Variations** tab.
3. Click **New Page Variation**, select **No Search Results**, and click **Next**.
4. Enter a name for the variation, and click **Create**.
Experience Builder creates the new page variation and returns to the No Search Results page.
5. Reopen Page Properties, and then reopen Page Variations.
6. (Optional) From the row actions menu for the new variation, select **Set to Default**.
You can change the page variation to be the default at any time.
7. From the row actions menu for the new variation, select **Edit**.
Experience Builder opens the new variation in the No Search Results page.
8. Click the **HTML Editor** component and then click **Edit Markup**.
9. Modify the default page content using HTML format.
10. Click **Save**, and publish the page variation.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

 **Note:** If you prefer not to redirect users to another page, you can show a no-results message directly on the Search Results page.

SEE ALSO:


[Manage No Search Results](#)

[Add a No Search Results Message to the Search Results Page \(Aura\)](#)

Add a No Search Results Message to the Search Results Page (Aura)

If you have a B2B store that uses the Aura template, you can bypass any No Search Results page redirects by showing a no search results message directly on the search results page.


1. In the Commerce App navigation menu, select **Stores**.
2. Select a store.
3. Click the **Experience Builder** tile, and open the **Search Results** page.
4. Select the **Results Layout** component, and edit its properties.

 **Note:** On the Results Layout component, no-results message properties are available only when the component's Page Type property is set to Search Results.

- a. Select **Show the no results message on the Search Results page**.
- b. Add your message in the No Results Message field using HTML format.

Here's an example HTML for creating your own message.

```
<br><br>
<h1> No results found</h1>
<br>
  <h2>Try these search tips instead:</h2>
<br>
  <ol>
    <li>Check your spelling</li>
    <li>Search by product type, SKU, or feature</li>
    <li>Broaden your search using fewer or more general words</li>
  </ol>
```

 **Note:** If you prefer to redirect users to another page, deselect **Show the no results message on the Search Results page**. The B2B Commerce template includes a No Search Results page that you can use by default or edit for your site needs.

SEE ALSO:

[Manage No Search Results](#)

Search Engine Optimization (SEO) for Commerce

Search engine optimization (SEO) focuses on increasing non-paid search engine traffic for your site. Utilizing both creative and technical elements, you can improve search engine ranking and awareness, with the goal of driving more traffic to your B2B or B2C store.

[SEO-Friendly URLs for Commerce](#)

Use canonical URLs and configure URL slugs to ensure your store's URLs optimally serve users and search engines.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

[Page Meta Tags for Commerce](#)

Meta tags in HTML documents provide structured data used by search engines for ranking and to show content in search results. You can configure page meta tags such as titles, descriptions, and headings in your store. For product pages, the Title Tag and Meta Description product fields determine the title and description meta tags.

[Manage the Store Sitemap](#)

Sitemaps for B2B and B2C stores improve SEO by giving search engines structured information for more efficient indexing. Like other Experience Builder sites, B2B and B2C stores automatically refresh their sitemaps weekly. You can also generate a manual sitemap refresh every 24 hours.

[Store Snapshots for SEO](#)

To improve SEO performance, B2B and B2C stores provide web crawlers with SEO optimized HTML using the Content Snapshot service.

SEO-Friendly URLs for Commerce

Use canonical URLs and configure URL slugs to ensure your store's URLs optimally serve users and search engines.

[SEO Considerations for Store URLs](#)

You can improve SEO performance by optimizing URL configuration in your B2B or B2C store.

[Add URL Slugs to Store Pages](#)

You can add a URL slug directly on a Product or Category record, or bulk update Products and Categories with a CSV file import. To use URL slugs, first configure languages and localizations for your store. When you enable URL slugs, default URLs for product and category pages are updated. For example, product pages use the base URL `/product/:urlName`.

[SEO-Friendly URLs for Store Categories](#)

Set up SEO-friendly URLs for a store's categories in bulk using a category import. When you perform a category import, you can also add or update category paths and descriptions.

[Add Canonical URLs to Store Pages](#)

Choose a canonical URL to consolidate a single page that uses multiple URLs or different pages with similar content.

SEO Considerations for Store URLs

You can improve SEO performance by optimizing URL configuration in your B2B or B2C store.

Canonical URLs

Choose a canonical URL to consolidate a single page that can be reached through multiple URLs or different pages with similar content. Improve SEO and direct search bots to the most representative page from a set of duplicate pages on your site. Without canonical URLs, search engines consider all of your identical or similar URLs as unique pages, which can cause SEO issues.

- Search engines can miss your unique content.
- Too much duplicate content can dilute content ranking.
- Ranked content doesn't reflect the best URL.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

Shopper-Friendly URLs

Product and Category pages generate shopper-friendly URLs based on the title of the product or category appended to a base path and object ID. The base path is configurable in the URL structure, but the category path or product record name and the record ID are required. For example, a category page has the URL `/category/:categoryPath/:recordId`. From Experience Builder, in Page Properties, you can edit the `/category/` portion of this base URL.

The screenshot shows a 'Properties' dialog box with two input fields. The 'Name' field is labeled 'Product' and the 'URL' field is labeled '/product:recordName:recordId'. Below the URL field is a button labeled 'Change Base URL'.

URL Slugs

Create SEO-friendly URL snippets, or “slugs,” for each Product and Category page. A URL slug improves SEO value by replacing a record ID with relevant and human-readable information in URLs, ensuring that your store’s pages are optimally surfaced in search engines. URL slugs are available in B2B Commerce and D2C Commerce LWR sites.

URL slugs map to the full path `store.com/product/{custom-slug}` for products and `store.com/category/{custom-slug}` for categories. From Experience Builder, in Page Properties, you can edit the `/product/` and `/category/` URL snippets, but you can’t remove them. For example, a Product page can have the URL slug `french-roast`, resulting in the full URL `store.com/product/french-roast`.

Auto-generated, canonical URLs for Product and Category pages use record IDs. Customers won’t see a slug-based URL unless they directly input a link that includes the URL slug.

When adding a URL slug, keep these considerations in mind.

- To use URL slugs, enable translation workbench and add active languages for translation. For more information, see [Translation Workbench](#).
- URL slugs have a character limit of 150 and allow these characters: `a-z A-Z 0-9 . - _ $ & : ; * , = @`. Foreign language characters are also allowed.
- In a Category URL slug, you can use `/` to delimit path segments. For example, the URL slug `coffee/whole-bean` creates the path `store.com/category/coffee/whole-bean`. This use of `/` isn’t accepted in a Product page URL slug.
- Use of the term `Product2` isn’t allowed in a URL slug. This URL is reserved for use in your site.
- When choosing a language for a URL slug, select a language that’s active in your org, site, and store. For more information, see [Supported Languages](#).
- Create a URL slug in your store’s default language and translate it for each language you support. When a customer is browsing in a language without a URL slug translation, but the page has a URL slug for your store’s default language, the slug falls back to the default. For example, if your default site language is English and a customer is browsing in French, both `store.com/fr/product/{slug-french}` and `store.com/fr/product/{slug-english}` will redirect to the corresponding record ID URL.
- When URL slugs are enabled and configured for product and category pages, they’re used as the canonical URL in sitemaps created for LWR stores. Otherwise, the sitemap continues using the record ID URL.

Redirects

If you're migrating a site to B2B or D2C Commerce, consider redirecting users to your new store's pages from pages outside of Salesforce. You can also set up redirects for pages within your B2B or B2C store to guide users from outdated product or category URLs to live pages.

SEE ALSO:

- [Add Canonical URLs to Store Pages](#)
- [Redirect Users to Your Experience Builder Site Pages](#)
- [SEO Page Properties](#)

Add URL Slugs to Store Pages

You can add a URL slug directly on a Product or Category record, or bulk update Products and Categories with a CSV file import. To use URL slugs, first configure languages and localizations for your store. When you enable URL slugs, default URLs for product and category pages are updated. For example, product pages use the base URL `/product/:urlName`.

1. From Setup, in the Quick Find box, enter *Digital Experiences*, and then select **All Sites**.
2. For an active LWR site, click **Workspaces**. URL slugs aren't available for stores created with the Aura template.
3. From the Experience Workspace, go to **Administration > Preferences** and select **Use SEO-friendly URLs on this site**. Publish your site to apply changes. You can't disable this setting after enabling it.
4. To bulk import slugs for Products, upload a CSV file including the column name `slug [language code]`. Use a language code that's active in your org, site, and store. For example `slug en_US`. For more information, see [Import Data for a Store Using a CSV File](#).
5. To bulk import slugs for Categories, perform a category import with a CSV file including the column name `slug [language code]`.
6. You can also add a URL slug directly on a Product or Category record. From the Commerce App navigation menu, select **Products** or **Categories**. Select a product or category. On the SEO tab, click **Add URL Slug**.

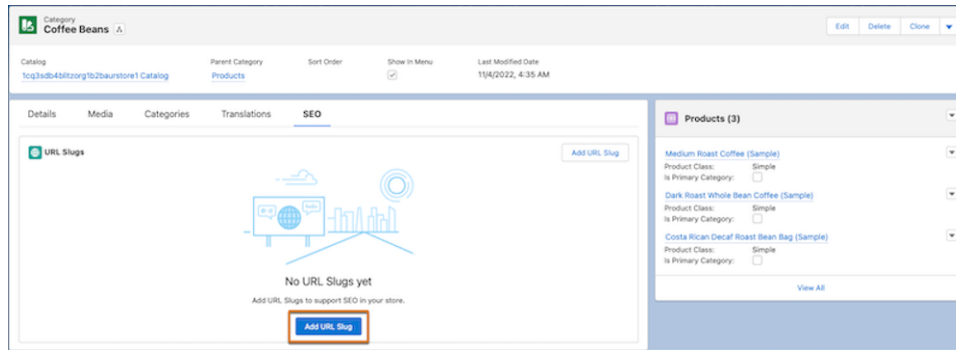
EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

 Example:



SEE ALSO:

[Import Data for a Store Using a CSV File](#)

SEO-Friendly URLs for Store Categories

Set up SEO-friendly URLs for a store's categories in bulk using a category import. When you perform a category import, you can also add or update category paths and descriptions.

[Import Category Data for a Store](#)

Use a category import to add or update category paths, descriptions, and their corresponding SEO-friendly URL slugs. Product import files can also include columns for categories, but a product import can't include URL slugs or descriptions for categories.

[CSV File Format for Importing Category Data for a Store](#)

When you construct a category import file, specify column headings that correspond to category path, URL slug, and category description information. Each row in the file represents a category and its structure. The column headings are case-insensitive, and the columns can be in any order.

Import Category Data for a Store

Use a category import to add or update category paths, descriptions, and their corresponding SEO-friendly URL slugs. Product import files can also include columns for categories, but a product import can't include URL slugs or descriptions for categories.

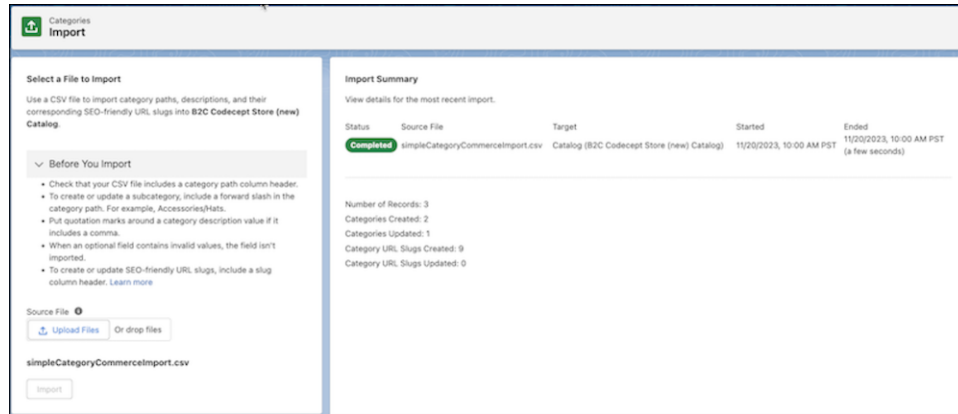
1. From the Commerce App Navigation menu, select **Catalogs**.
2. Select a catalog.
3. On the Categories tab, click **Import**.
4. Click **Upload Files**. You can optionally download a sample data import file to use as a starting point for creating your file.
5. Click **Import**. Because the import is asynchronous, you can perform other tasks while the import processes. To get the status of the import, refresh the page or click the refresh button. The Import Summary report shows the import results, including any errors caused by rows or column headings. If you have errors, fix the file, and import it again.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce



6. (Optional) Cancel the import.
 - a. In the Import Summary, click **Cancel**.
 - b. Confirm the cancellation, click **Cancel Import**.
 - c. Refresh the page for the Import Summary report to show an accurate count of categories updated prior to the cancellation.

SEE ALSO:

[CSV File Format for Importing Category Data for a Store](#)

CSV File Format for Importing Category Data for a Store

When you construct a category import file, specify column headings that correspond to category path, URL slug, and category description information. Each row in the file represents a category and its structure. The column headings are case-insensitive, and the columns can be in any order.

Column Heading	Column Value
Category Description	(Optional) The description of the category, corresponding to the Description field on the ProductCategory object. Put quotation marks around a category description value if it includes a comma.
Category Path	The path of the category, with / to delimit path segments. For example, the category path coffee/whole-bean creates the path store.com/category/coffee/whole-bean. <ul style="list-style-type: none"> • The last delimited value in the category path is used as the category name.
Slug <language code>	(Optional) The SEO-friendly URL slug for the category in a specified language.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Column Heading	Column Value
	<ul style="list-style-type: none"> In the column heading, specify a Salesforce-supported language code. For example, <code>slug_en_US</code>. Use of the term <code>Product2</code> isn't allowed in a URL slug. This URL is reserved for use in your site. <p>URL slugs have a character limit of 150 and allow these characters: <code>a-z A-Z 0-9 . - _ \$ & : ; * , = @</code>. Foreign language characters are also allowed.</p>

SEE ALSO:

[Import Category Data for a Store](#)

[Import Data for a Store Using a CSV File](#)

Add Canonical URLs to Store Pages

Choose a canonical URL to consolidate a single page that uses multiple URLs or different pages with similar content.

For Record pages with dynamic data, we recommend that you create a custom field for the object to store the canonical URL.

- From Setup, in the Quick Find box, enter *Object Manager*, and then select **Object Manager**.
- Click the object you want to give a canonical URL.
- From the object management settings, go to Fields & Relationships.
- Click **New**.
- On the New Custom Field page, select **URL** as the data type, and then click **Next**.
- In the Field Label and Field Name fields, enter *CanonicalURL*, and then click **Next**.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

SETUP > OBJECT MANAGER
Product

Product
New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label CanonicalURL

Field Name CanonicalURL

Description


Help Text

Required Always require a value in this field in order to save a record

Auto add to custom report type Add this field to existing custom report types that contain this entity

Default Value Show Formula Editor

Use formula syntax. Enclose text and picklist value API names in double quotes ("the text"). Include numbers without quotes. (%). Show percentages as decimals. (%). and express date calculations in the standard format: (Date) + "T". To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__andRecordAPIName.Field__c

7. Most standard fields are accessible to a guest user by default. To ensure access, confirm that Public Access and field-level security (FLS) are enabled so that the Guest User profile has access to the fields displayed. See [Make Objects Available for SEO](#).
8. Select the page layouts you want to include the canonical URL, for example, Product Layout for Product, and then save your changes.
9. From Experience Builder, open the page you want to edit.
10. Click the Page Properties icon. 
11. Click **Edit Head Tags**.
12. To set the canonical URL, use the expression for the new field you created. For example, `<link rel="canonical" href="{!Record.CanonicalURL__c}">`

Edit Head Tags

Enter tags to provide metadata about this page for search engines, browsers, and web services.

To improve relevancy and search results, use expressions to show values from the associated record. For example, show a record's object and title with `{!Record._Object: {!Record._Title}}`, or a field with `{!Record.Field}`.

Ensure the Guest User profile has access to objects and field that you reference.

```
1 <link rel="canonical" href="{!Record.CanonicalURL__c}">
```

13. In the Record properties, enter the URL in the custom CanonicalURL field.

Edit GoBrew French Roast MCT + Protein Vegan, 6 oz can - 6 pack

<p>* Product Name</p> <input type="text" value="GoBrew French Roast MCT + Protein Vegan, 6 oz can - 6 pack"/>	<p>Product Family</p> <input type="text" value="--None--"/>
<p>Product Code</p> <input type="text" value=""/>	<p>Active</p> <input checked="" type="checkbox"/>
<p>* Product Currency</p> <input type="text" value="USD - U.S. Dollar"/>	
<p>CanonicalURL</p> <div style="border: 2px solid orange; padding: 2px;"> <input type="text" value="https://mysite.com/s/gobrew-protein-vegan"/> </div>	
<p>Product Description</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p>Alpine Blends GoBrew French Roast Coffee in 6 oz can. Great value 100% Arabic French Roast Dark Ground Coffee showcases a rich blend of Arabica beans that are dark roasted for a deep captivating flavor.</p> </div>	

After you create a custom field for canonical URLs, you can update them in bulk with a CSV file import. In the CSV file, specify column headings that correspond to Product, Category, Price Book information, and your canonical URL field. Each row in the file represents a product, its variations, and their corresponding canonical URLs.

To set up a canonical URL for a standard page without dynamic data, open the Experience Builder Page Properties tab. Select the SEO tab and then **Edit Head Tags**. Enter the properties as shown with your canonical URL.

```
<link rel="canonical" href="https://mysite.com/s/canonicalURL">
```

SEE ALSO:

[SEO Considerations for Store URLs](#)

[Import Data for a Store Using a CSV File](#)

Page Meta Tags for Commerce

Meta tags in HTML documents provide structured data used by search engines for ranking and to show content in search results. You can configure page meta tags such as titles, descriptions, and headings in your store. For product pages, the Title Tag and Meta Description product fields determine the title and description meta tags.

[SEO Guidelines for Commerce Page Meta Tags](#)

To increase the SEO value of your store, add meta tags to Product, Category, and other pages.

[Configure Page Meta Tags for Commerce](#)

The Title Tag and Meta Description fields determine page meta tags for products. You can create these product fields using Einstein generative AI or through the SEO tab of a product record. For other meta tags such as headings, and for other pages such as Category pages, you can use Experience Builder to edit head tags within page properties.

[Structured Data for Commerce Product Meta Tags](#)

Create rich and engaging search results by using structured data from your store to dynamically update a page's meta tags. For example, you can map product attributes like color or size to meta tags using expressions.

SEO Guidelines for Commerce Page Meta Tags

To increase the SEO value of your store, add meta tags to Product, Category, and other pages.

For detailed meta tag guidelines, refer to [Google Search documentation](#).

Titles

Search engines extract a page's title from the title meta tag. Use relevant titles for your store to ensure search engines rank your pages for the keywords you want. On Product pages, you can use the Title Tag field to generate title meta tags. On Category pages, use the Name field or a custom field.

Descriptions

The description meta tag is a short page description that can appear in search engine results.

Provide an accurate description of the content of your page between 150-165 characters. On Product pages, you can use the Meta Description field to generate description meta tags. On Category pages, use the Category Description field or a custom field.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer Editions**

Available in: B2B Commerce and D2C Commerce

Headings (H1-6 Tags)

Headings provide page structure to improve the user experience and help search engines understand the content. In B2B and B2C stores, certain pages populate heading tags with relevant information. You can add additional header tags to store pages as component customizations.

- On the product detail page (PDP), the Product Name field populates H1, the top level heading.
- On category pages, the Category Name field populates H1. The phrase “[# of results] of [total] Results” populates H2.
- In store search results, the phrase “[# of results] of [total] items” populates H3.

SEE ALSO:

[Configure Page Meta Tags for Commerce](#)

Configure Page Meta Tags for Commerce

The Title Tag and Meta Description fields determine page meta tags for products. You can create these product fields using Einstein generative AI or through the SEO tab of a product record. For other meta tags such as headings, and for other pages such as Category pages, you can use Experience Builder to edit head tags within page properties.

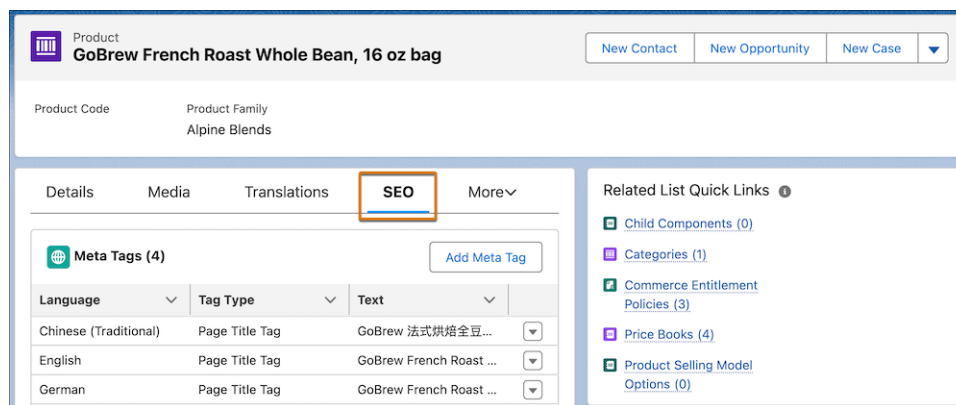
1. Generate title tag and meta description fields for multiple products at once using Einstein generative AI. For instructions, see [Enhance Product Fields with Einstein](#).
 - a. From the Create and Review Field Text page, select the Title Tag or Meta Description field. Enter an instruction like “Write a short title for these products” or “Write descriptions about these products.”
2. To view and manage a product’s page meta tags, open the product record and navigate to the SEO tab.


EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce



3. From the Page Meta Tags table, you can edit, delete, and add page meta tags for the product without using Einstein generative AI.
4. To add additional page meta tags to your store, use Experience Builder.
 - a. From Experience Builder, open the page you want to edit.
 - b. Click the Page Properties icon. 

Properties

Name ⓘ
Home

URL ⓘ
/

API Name ⓘ
Home

Page Access ⓘ
Site Default Setting: Public

SEO
Help people find your pages more easily by adding search engine optimization (SEO) properties. The text fields in this section are translatable. [Learn More](#)

Title ⓘ
Home

Description ⓘ
Page description that can appear in search engine results.

- c. Enter a title. On Product pages, use the Product Name field or a custom field. On Category pages, use the Name field or a custom field. Use expressions to populate the head tag with values from the record. For example, show a record's object and title with `{!Record._Object} : {!Record._Title}`, or a field with `{!Record.Field}`.
- d. Enter a description.
- e. If you want to use other meta tags, click **Edit Head Tags**, enter a meta tag, and save your changes. For example, the Robots meta tag `<meta name="robots" content="noindex">` tells crawlers not to index a page so it won't show up in search results.

Edit Head Tags
Enter tags to provide metadata about this page for search engines, browsers, and web services.

```
1 <meta name="robots" content="noindex">
```

Cancel Save

- f. Save your changes.

SEE ALSO:

[SEO Page Properties](#)

[SEO Guidelines for Commerce Page Meta Tags](#)

Structured Data for Commerce Product Meta Tags

Create rich and engaging search results by using structured data from your store to dynamically update a page's meta tags. For example, you can map product attributes like color or size to meta tags using expressions.

Field	expression	example value
Product Category Name	<code>{!Record.ProductCategory.Name}</code>	"Clothing"
Product Attributes (must use variant products)	<code>{!Record.ProductAttributes.<custom field you created for variant products>}</code>	Dependent on the field created for variant products. For example, "Medium" or "Red" for size or color.
Price Currency	<code>{!Record.Offers.Currency}</code>	"USD"
Price	<code>{!Record.Offers.Price}</code>	"32.99"
Breadcrumb	<code>{!Record.BreadcrumbList}</code>	[{"@type": "ListItem", "item": "https://domain.com/storeName/category/merchandise/0ZGxx000000004rGAA", "position": 1, "name": "Merchandise"}, {"@type": "ListItem", "item": "https://domain.com/storeName/category/merchandise/clothing/0ZGxx000000006TGAQ", "position": 2, "name": "Clothing"}]
Default Product Image	<code>{!Record.ProductMedia.DefaultImage}</code>	"https://domain.com/image1.jpg"
Product Detail Images	<code>{!Record.ProductMedia.ProductDetailImages}</code>	["https://domain.com/image1.jpg","https://domain.com/image2.jpg"]

To use product attribute values in meta tags, first set up variant products. For more information, see [Product Variations and Attributes](#). To use pricing information, make sure that your products belong to a standard price book. To use breadcrumbs, make sure the primary category of your product is navigable. For more information, see [Choose Product Categories to Use in Breadcrumbs](#).

Use a script with these expressions to add structured data to a custom head tag on a Product Detail Page. For more information, see [Configure Page Meta Tags for Commerce](#).

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

 Example:

```
<script type="application/ld+json">
[
  {
    "@context": "https://schema.org/",
    "@type": "Product",
    "name": "{!Record.Name}",
    "category": "{!Record.ProductCategory.Name}",
    "color": "{!Record.ProductAttributes.ProductColor__c}",
    "size": "{!Record.ProductAttributes.ProductSize__c}",
    "material": "{!Record.ProductAttributes.ProductMaterial__c}",
    "offers": {
      "@type": "Offer",
      "priceCurrency": "{!Record.Offers.Currency}",
      "price": "{!Record.Offers.Price}"
    },
    "image": "{!Record.ProductMedia.DefaultImage}"
  },
  {
    "@context": "https://schema.org",
    "@type": "BreadcrumbList",
    "itemListElement": "{!Record.BreadcrumbList}"
  }
]
</script>
```

Validate Structured Data

Product structured data is surfaced in test environments, such as a sandbox, trial, or Developer Edition orgs. To validate structured data in a test environment, inspect the HTML source code for a page and navigate to the `<script>` tags containing the JSON-LD data as shown in the example.

In production environments, product structured data is only surfaced to select bot user-agents. To view your store's structured data in a production org, you can mimic a search engine user-agent string such as googlebot or bing using a user-agent switcher. Perform a manual snapshot refresh before validating structured data in a production org. For a full list of bots allowed to crawl Experience Builder sites, see [SEO for Experience Builder Sites FAQ](#).

SEE ALSO:

[Product Variations and Attributes](#)

[SEO Guidelines for Commerce Page Meta Tags](#)

Manage the Store Sitemap

Sitemaps for B2B and B2C stores improve SEO by giving search engines structured information for more efficient indexing. Like other Experience Builder sites, B2B and B2C stores automatically refresh their sitemaps weekly. You can also generate a manual sitemap refresh every 24 hours.



Warning: Sitemap generation fails if your default site language is unavailable in the webstore. When configuring your store's language, the default language that you select in Experience Builder must be the same as the default language you selected on the Administration tile for the store.

SEE ALSO:

[Generate a Manual Sitemap Refresh for Your Experience Cloud Site](#)
[Configure Store Language, Currency, and Tax](#)

Store Snapshots for SEO

To improve SEO performance, B2B and B2C stores provide web crawlers with SEO optimized HTML using the Content Snapshot service.

Salesforce takes a snapshot of your site's publicly available pages including localized pages every 15 days. When you add new pages to your site, snapshots of these are included in an incremental snapshot update every 24 hours. You can also take snapshots manually every 24 hours. For example, if you update a page's content with time-sensitive information, such as price changes for a flash sale, you can take a manual snapshot instead of waiting for the automatic update.

SEE ALSO:

[Provide Search Engines with Fresh Content Snapshots](#)

Commerce Einstein

Commerce Einstein uses AI to automate tasks and personalize customer shopping experiences.

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[What Is Commerce Einstein?](#)

Commerce Einstein provides AI-powered merchandising tools to enhance shopper experiences.

[Deploy Commerce Einstein](#)

Deploy Commerce Einstein to enable all available Einstein features. These features currently include activity tracking and Einstein recommendations. Deploying Commerce Einstein can take up to 24 hours to complete.

[Activity Tracking](#)

Activity tracking captures browser-based, real-time customer activities on your storefront, unless settings are explicitly changed by the customer.

[Preconfigured Commerce Einstein Recommendations for B2C Stores](#)

When you use a D2C Commerce site template to create a B2C store, Commerce Einstein adds recommendations to certain pages in Experience Builder. These preconfigured recommendations are based on the most-common and top-performing use cases across Commerce Cloud.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce


[Reindex Commerce Einstein](#)

Changes to your store's product catalog are automatically sent to Commerce Einstein every 7 days, but you can manually reindex after making changes. Reindexing can take up to 24 hours to complete.

What Is Commerce Einstein?

Commerce Einstein provides AI-powered merchandising tools to enhance shopper experiences.

After deploying Commerce Einstein, you can enable activity tracking and configure Einstein recommendations for your storefront.

Function	Description
Activity tracking	<p>Enables Commerce Einstein to gather client- and server-side customer activity on your storefront. Commerce Einstein uses these metrics as real-time input for personalizing the shopper experience.</p> <p> Note: Shoppers can opt out of activity tracking.</p>
Einstein recommendations	Personalizes the D2C shopping experience by automating product discovery on your storefront.

SEE ALSO:

[Deploy Commerce Einstein](#)

[Activity Tracking](#)

[Reindex Commerce Einstein](#)

[Einstein Recommendations Component \(LWR\) for B2C Stores](#)

Deploy Commerce Einstein

Deploy Commerce Einstein to enable all available Einstein features. These features currently include activity tracking and Einstein recommendations. Deploying Commerce Einstein can take up to 24 hours to complete.

Before you deploy Commerce Einstein:

- Assign a catalog to your store.
 - Assign categories to your products.
 - Ensure that all products that you want used in Einstein Recommendations are active.
 - Ensure that your organization-wide sharing value for Product object default internal access is set to either **Public Read** or **Public Read/Write**.
1. From the Commerce App navigation menu, select **Administration Workspace**.
 2. Click the **Commerce Einstein** tab.
 3. In the Deploy Commerce Einstein section, click the toggle to **Enable**.
The Status bar indicates that the deployment has started. When Commerce Einstein is processing the catalog and Einstein data, these errors can occur.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

Error Type	Resolution
Catalog error	<p>Confirm your store catalog assignment and product activation, and then click Reindex.</p> <p>If the issue persists, create a case and submit to Salesforce Customer Support.</p>
Internal error	<p>Reprocess the data by clicking Reindex.</p> <p>If the issue persists, create a case and submit to Salesforce Customer Support.</p>

SEE ALSO:[What Is Commerce Einstein?](#)[Reindex Commerce Einstein](#)[Activity Tracking](#)[Einstein Recommendations Component \(LWR\) for B2C Stores](#)

Activity Tracking

Activity tracking captures browser-based, real-time customer activities on your storefront, unless settings are explicitly changed by the customer.

Tracked Data

Commerce Einstein uses cookies and session storage objects to store and track browser activities. It uses this information to tailor customer experiences. Some cookies are essential, and some are functional. Essential cookies are necessary for a site to work correctly and can't be disabled. Commerce Einstein uses functional cookies and tracked API activities to personalize shopper data.

Add a CSP Trusted Site for the Commerce Einstein Domain

Before you enable activity tracking, add a trusted URL for the Einstein domain.

Enable Activity Tracking

Activity tracking captures browser-based, real-time buyer or shopper activities on your storefront, unless settings are explicitly changed by the buyer or shopper.

Commerce Cloud Cookies

Stores use cookies to improve functionality and accelerate processing times. By saving a user's settings, cookies can enhance the user's experience and the performance of the store. In addition to these Commerce-specific cookies, stores can use cookies that apply to all Experience Cloud sites.

Tracked Data

Commerce Einstein uses cookies and session storage objects to store and track browser activities. It uses this information to tailor customer experiences. Some cookies are essential, and some are functional. Essential cookies are necessary for a site to work correctly and can't be disabled.

Commerce Einstein uses functional cookies and tracked API activities to personalize shopper data.

Commerce Einstein supports third-party cookie consent banner integration (for example, CookiePro by OneTrust). Depending on how consent is configured with these third-party integrations, customers must opt in to use functional cookies to personalize the shopping experience with Commerce Einstein. If shoppers don't have a way to opt in to use functional cookies, the site doesn't personalize the consumer experience using Commerce Einstein.

Depending on the use cases applied, Commerce Einstein can continue generating recommendations for a shopper using data from other customers that have browsed or made purchases on the site.


When a customer accepts cookies, the cookies remain in the browser until they expire or until the customer deletes them.

 **Note:** All described cookies and API requests have a lifespan of 1 year unless the customer deletes them.

Commerce Einstein uses the `cqcid` cookie when tracking activity.

Data Object	Supported Products	Party	Cookie Type	Description
cqcid	D2C Commerce	First	Functional	Unique value for an unregistered buyer or shopper

Commerce Einstein uses these API requests when tracking activity.

Data Object	Supported Product	Client Side or Server Side	How Commerce Einstein Tracks
viewProduct	D2C Commerce	Client	When a customer views a product page
viewReco	D2C Commerce	Client	When a recommendation appears on a page  Note: Commerce Einstein doesn't track whether a customer scrolls to view a recommendation.
clickReco	D2C Commerce	Client	When a customer clicks an Einstein recommendation
viewSearch	B2B Commerce	Client	When a customer views a product listing page
clickSearch	B2B Commerce	Client	When a customer clicks a product on the product listing page
addToCart	D2C Commerce	Client	When a customer adds a product to their cart

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

Data Object	Supported Product	Client Side or Server Side	How Commerce Einstein Tracks
finishCheckout	D2C Commerce	Server	A customer's purchase at time of order confirmation

SEE ALSO:

- [Experience Cloud Cookies](#)
- [What Is Commerce Einstein?](#)
- [Enable Activity Tracking](#)
- [Deploy Commerce Einstein](#)
- [Einstein Recommendations Component \(LWR\) for B2C Stores](#)

Add a CSP Trusted Site for the Commerce Einstein Domain

Before you enable activity tracking, add a trusted URL for the Einstein domain.

1. Add a [trusted URL](#) with these settings.
 - a. For URL, enter `https://api.cquotient.com`.
 - b. In the Content Security Policy (CSP) Settings section, for context, select **All**.
 - c. Select the **connect-src (scripts)** CSP directive.
 - d. Select the **img-src (images)** CSP directive.

SEE ALSO:

- [What Is Commerce Einstein?](#)
- [Tracked Data](#)
- [Enable Activity Tracking](#)
- [Deploy Commerce Einstein](#)

Enable Activity Tracking

Activity tracking captures browser-based, real-time buyer or shopper activities on your storefront, unless settings are explicitly changed by the buyer or shopper.



Note: Before enabling activity tracking, add a CSP trusted site for the Commerce Einstein domain, and deploy Commerce Einstein.

1. From the Commerce App navigation menu, select **Administration Workspace**.
2. Click **Commerce Einstein**.
3. Click to expand the **Storefront Activity Tracking** section.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

EDITIONS

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Available in: B2B Commerce and D2C Commerce

- In the Enable Activity Tracking section, click the toggle to **Enabled**.

SEE ALSO:

- [What Is Commerce Einstein?](#)
- [Tracked Data](#)
- [Add a CSP Trusted Site for the Commerce Einstein Domain](#)
- [Deploy Commerce Einstein](#)

Commerce Cloud Cookies

Stores use cookies to improve functionality and accelerate processing times. By saving a user's settings, cookies can enhance the user's experience and the performance of the store. In addition to these Commerce-specific cookies, stores can use cookies that apply to all Experience Cloud sites.

Salesforce doesn't currently provide functionality for end-user cookie consent management. The platform is compatible with many existing third-party solutions. We recommend that you work with your internal IT teams or consult your implementation partners to identify the right solution for your organization's needs.

Cookies are divided into required, functional, and marketing. Functional cookies include preferences and statistics.

- **Required:** Strictly necessary to browse the website and to use its features.
- **Functional: Preferences:** Used by the website to remember choices made previously. Language settings are an example of a preference type cookie.
- **Functional: Statistics:** Used to collect information about how a website is used, including links clicked and which pages users visited.
- **Marketing:** Used to track online activity for a more personalized experience, including relevant advertisement.

This table describes the Commerce Cloud cookies collected by Salesforce. For additional cookies, see [Experience Cloud Cookies](#).

Cookie Name	Duration	Cookie Type	Description
cqcid	1 year	Functional: Statistics	Provides a unique value for an unregistered buyer or shopper. Used by Commerce Einstein to track activity. For more information, see Tracked Data .
GuestCartSessionId_{storeId}	7 days or custom guest cart expiration time	Functional: Statistics	Provides a unique ID for a guest user's cart session. For more information, see Enable Guest Access to a Store .
guest_uid_essential_{siteId}	1 year	Required	Provides a unique ID for guest users in Experience Cloud sites.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

Cookie Name	Duration	Cookie Type	Description
			Expires one year after the user's last visit to the site.

SEE ALSO:

[Experience Cloud Cookies](#)

[Activity Tracking](#)

Preconfigured Commerce Einstein Recommendations for B2C Stores

When you use a D2C Commerce site template to create a B2C store, Commerce Einstein adds recommendations to certain pages in Experience Builder. These preconfigured recommendations are based on the most-common and top-performing use cases across Commerce Cloud.

You can edit and remove default recommendations components, or add additional recommendations components to pages.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

Page	Header Text	Anchor	Use Case
Home	Top Sellers	No Anchor	Top Selling
	Recommendations for You	No Anchor	Personalized for Shopper
Cart	Customers Also Bought	Products in Cart	Upsell
Category	Top Selling in Category	Category Viewed	Top Selling by Category
	Most Viewed in Category	Category Viewed	Most Viewed by Category
Profile	Recently Viewed	No Anchor	Recently Viewed
Product	Similar Products	Product Viewed	Similar Products
	Complementary Products	Product Viewed	Complementary Products
Search	Recommendations for You	No Anchor	Personalized by Shopper

SEE ALSO:

[What Is Commerce Einstein?](#)

[Deploy Commerce Einstein](#)

[Einstein Recommendations Component \(LWR\) for B2C Stores](#)

Reindex Commerce Einstein

Changes to your store's product catalog are automatically sent to Commerce Einstein every 7 days, but you can manually reindex after making changes. Reindexing can take up to 24 hours to complete.

These changes require rebuilding the Commerce Einstein index before they're available to shoppers:

- Updating products in the store's catalog
 - Changing the category hierarchy structure
 - Adding or removing categories from the category hierarchy structure
 - Updating category names
 - Adding or updating the products in an entitlement policy
 - Changing the geolocation of your organization
 - Removing or changing the name of a custom field on the Product2 object
1. From the Commerce App navigation menu, select **Administration Workspace**.
 2. Click the **Commerce Einstein** tab.
 3. In the Deploy Commerce Einstein section, click **Reindex**.

A message appears under the status bar to indicate that the reindex process has started.

SEE ALSO:

[Create a Catalog and Assign It to a Store](#)

[What Is Commerce Einstein?](#)

[Commerce Einstein](#)

[Einstein Recommendations Component \(LWR\) for B2C Stores](#)

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited,** and **Developer Editions**

Available in: B2B Commerce and D2C Commerce

Store Management

Manage stores more efficiently using workspaces. Expand the reach of your store by enhancing language and currency support. Create and manage promotions to increase buyer incentive. Migrate store configurations, create custom reports, and manage existing integrations. Set up the emails that shoppers and buyers receive when they place an order, and what they see when your site isn't available. Review the steps required to use Omnichannel Inventory with commerce stores.

[Goals and Recommendations](#)

Get specific actions that you can take to achieve performance goals for your store. Goals can include improving site conversion and increasing site traffic and average order value.

[Get Help with Store Issues with the Troubleshooting Assistant](#)

If you're having trouble configuring or managing a store, ask the Troubleshooting Assistant for help. The Troubleshooting Assistant can help you determine whether a buyer or guest customer can see a product in the store. The Troubleshooting Assistant displays the tasks required to configure a store and its products and which of those tasks have been completed.

[Manage Your Store from the Store Landing Page](#)

From your store landing page you can access tools to design and build your store, organize your products, configure your search index, set pricing, and make other administrative changes.

[Using Salesforce CMS for Product Media](#)

A Content Management System (CMS) workspace offers a secure environment to create, edit, organize, and manage digital content. When you create a store, a CMS workspace for the store and a public channel from the store to that workspace are added. You can upload or import product media from a CMS workspace into your store.

[Assign a CMS Public Channel to a Commerce Store](#)

When you create a store, a CMS workspace and a public channel to the workspace are added. If you have an LWR store built on an enhanced LWR site, you can change the public channel. A store can access content from all CMS workspaces that include the store's public channel.

[Commerce Workspaces](#)

Multiple workspaces come together in the Commerce app to make workflows more efficient, make information easier to find and update, and to organize shared contents.

[Migrate Your Store Configuration](#)

After you configure your store, you can move its configuration to a new environment, for example, from sandbox to production, by creating a change set. The change set includes the store's metadata, such as descriptions, localization, pricing, and search settings.

[Commerce Analytics](#)

Take action on insights about revenue, product performance, and customer behavior from Commerce Analytics dashboards.

[Create Custom Reports with Search and Category Data for B2B Stores](#)

To gain insight into the products that buyers interact with, create custom reports with Google Analytics using the search and category data that Salesforce provides.

[Manage Integrations for Your Store](#)

Your B2B or B2C store requires several integrations to function properly.

[Set Up Inventory for Commerce Stores](#)

To integrate inventory with your store, use Omnichannel Inventory or a custom provider. Inventory availability in your storefront is only considered when the inventory integration is turned on.

[Replace a Default Commerce Process with an Apex Class](#)

Use extension points to enhance or replace default Salesforce Commerce processing with Apex classes. For example, by default Salesforce Commerce uses standard Salesforce price books to determine how products are priced. If you want to use a different pricing method, you can use an Apex class for pricing instead.

[Create Email Order Confirmation Notifications](#)

You can create an email to send to shoppers or buyers when they submit an order in a B2B or B2C store created with an LWR template. We provide examples that you can download, deploy, and customize.

[Configure What Shoppers or Buyers See When a Store Isn't Available](#)

When a CDN is enabled for your store, the Service Not Available page is available in Experience Builder for you to customize with your own brand and message. Shoppers and buyers see the Service Not Available page when your store is unavailable.

[Using Salesforce Omnichannel Inventory with Commerce Stores](#)

Configure Omnichannel Inventory, Order Management, and Salesforce Commerce so that they can work together. Learn how to use Omnichannel Inventory with commerce stores.

Goals and Recommendations

Get specific actions that you can take to achieve performance goals for your store. Goals can include improving site conversion and increasing site traffic and average order value.

[Considerations for Goals and Recommendations](#)

As you begin using goals and recommendations, keep these considerations in mind.

[Get Recommendations to Improve Store Performance](#)

Use the available goals and their corresponding recommendations to achieve specific targets for your store. You can choose which recommendations to take. Some are based on insights into your store and unique to your store's data, and others are general recommended actions. Monitor goal progress over time with data-driven insights into conversion rate, average order value, site traffic and more.

Considerations for Goals and Recommendations

As you begin using goals and recommendations, keep these considerations in mind.

- Some goals and recommendations appear only if your data meets the criteria for showing them.
- Some recommendations use Einstein Generative AI, which must be enabled in your org. See [Enable Einstein Generative AI](#).
- Product Readiness must be enabled in your org. See [Enable Product Readiness](#).
- Your org must have sales data for some recommendations to appear.

SEE ALSO:

[Get Recommendations to Improve Store Performance](#)

Get Recommendations to Improve Store Performance

Use the available goals and their corresponding recommendations to achieve specific targets for your store. You can choose which recommendations to take. Some are based on insights into your store and unique to your store's data, and others are general recommended actions. Monitor goal progress over time with data-driven insights into conversion rate, average order value, site traffic and more.

1. From the Commerce App Navigation menu, select **Goals and Recommendations**.
2. In the Scope dropdown, select a store to view the available goals.
3. Select a goal to see the corresponding recommendations.
4. To view the details of a recommendation, click **Get Started**.
5. To proceed with the recommendation, click **Get Started** or close the window to exit.

SEE ALSO:

[Considerations for Goals and Recommendations](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

Get Help with Store Issues with the Troubleshooting Assistant

If you're having trouble configuring or managing a store, ask the Troubleshooting Assistant for help. The Troubleshooting Assistant can help you determine whether a buyer or guest customer can see a product in the store. The Troubleshooting Assistant displays the tasks required to configure a store and its products and which of those tasks have been completed.

1. From the Commerce App navigation menu, select **Commerce Setup**.
2. Go to **Tools > Troubleshooting Assistant**.
3. Select the issue that you want help with.
4. Search for and enter the product.
5. Search for and enter the store.
6. If applicable, search for and enter the user who that you want to see the product.
7. Click **Submit**.

The Results panel shows the product's status and identifies tasks that aren't complete.

SEE ALSO:

[Commerce Workspaces](#)

Manage Your Store from the Store Landing Page

From your store landing page you can access tools to design and build your store, organize your products, configure your search index, set pricing, and make other administrative changes.

To access a store's landing page, click the Commerce app navigation dropdown menu and select Stores. Then select your store.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited,** and **Developer Editions**

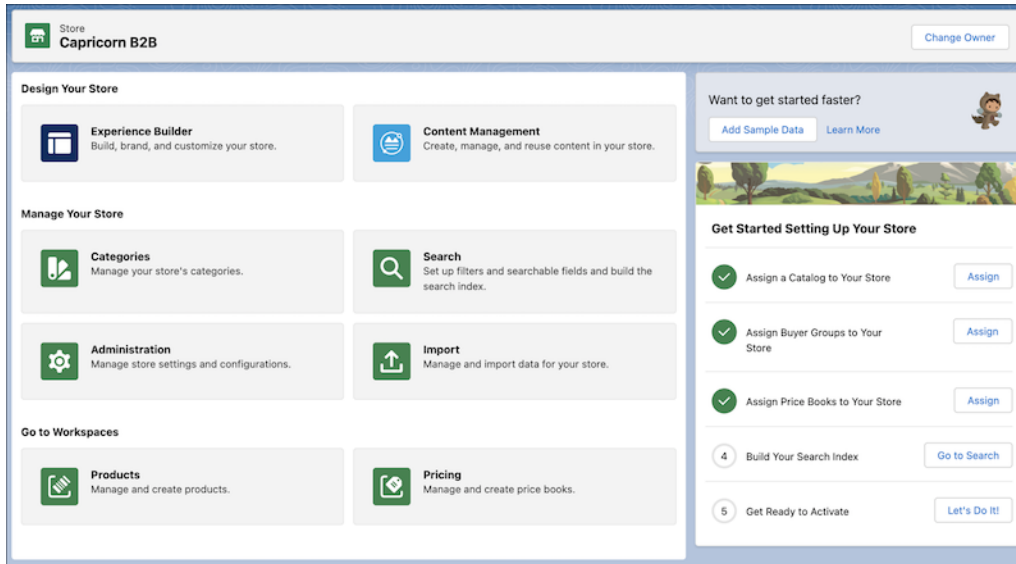
Available in: B2B Commerce and D2C Commerce

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited,** and **Developer Editions**

Available in: B2B Commerce and D2C Commerce



The Design Your Store section displays tiles that direct you to pages where you can configure and design your store.

- Experience Builder—Design your store, configure new components, and set up site navigation.
- Content Management —Organize and manage content for your store’s products and categories, such as images and attachments.

The Manage Your Store section tiles take you to the pages that you use the most to manage your store.

- Catalog—View the catalogs that are available to the store. You can assign a catalog to a store from this list. Click a catalog to see its categories and the stores that are assigned to it.
- Search—Use to build and rebuild your search index and monitor its status. You can also mark product fields as searchable and add search filters.
- Administration—Review and update your store’s general settings, track buyer access, and publish your store. You can also migrate a B2B store’s configuration to a new environment.
- Import—Upload a list of products. Imported products are associated with the default catalog and price books for your store.

The Go to Workspaces section tiles take you to workspaces where you can manage Commerce objects.

- Products—Shows a filterable, hybrid list of all available products. You can update the products in bulk and customize the list’s columns to provide the information most relevant to your store.
- Pricing—Lists all available price books and price book entries. From this page, you can assign price books to a store.
- Promotions—Create and manage promotional discounts, including coupons, for your B2B store.

The Get Started Setting Up Your Store section walks you through the process of setting up your B2B store, such as:

- Adding a sample store with data to your org to test its functionality
- Associating your store with catalogs, buyer groups, and price books
- Making sure that your search index is ready to go
- Checking that everything has been set up correctly before activating your store

To transfer the ownership of a store from one user to another, use the Change Owner button. For example, if your Salesforce admin is leaving the company, they can change store ownership to another admin.

SEE ALSO:

[Commerce Workspaces](#)

[Use Experience Builder to Customize Your Store](#)

Using Salesforce CMS for Product Media

A Content Management System (CMS) workspace offers a secure environment to create, edit, organize, and manage digital content. When you create a store, a CMS workspace for the store and a public channel from the store to that workspace are added. You can upload or import product media from a CMS workspace into your store.

A store can access content from all workspaces that include the store's public channel. You can change the public channel assigned to the store. See [Assign a CMS Public Channel to a Commerce Store](#).

To add the store's public channel to a workspace, see [Add a Channel to a CMS Workspace](#).

When you use a CSV file to import images globally for all stores, you must specify a CMS workspace where the imported images are linked. If you don't have a CMS workspace, create one before you begin the global import process. See [Create a CMS Workspace to Import Images to a Commerce Store](#). When you import to a store, you must use the default workspace for that store. You can't specify that the import process use a different workspace.

SEE ALSO:

[CMS Content](#)

Assign a CMS Public Channel to a Commerce Store

When you create a store, a CMS workspace and a public channel to the workspace are added. If you have an LWR store built on an enhanced LWR site, you can change the public channel. A store can access content from all CMS workspaces that include the store's public channel.

1. On your store's administration page, select **Administration > General**.
2. Under CMS Public Channel, select an enhanced CMS public channel for the store.

SEE ALSO:

[Using Salesforce CMS for Product Media](#)

Commerce Workspaces

Multiple workspaces come together in the Commerce app to make workflows more efficient, make information easier to find and update, and to organize shared contents.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

Manage Pricing in the Pricing Workspace

You can manage all price books and price book entries in your organization in the Pricing Workspace. You can filter the list by a specific store.

Manage Products in the Product Workspace

The Product Workspace displays all products in your organization. You can add filters and adjust which columns to display. You can also create your own lists. Update multiple products, add new products, edit fields for products, and create variation products.

Search the Product Workspace

Use the search box to search fields in the product workspace.

Manage Promotions with the Promotion Workspace

The Promotion Workspace consolidates all your promotions in one place. You can use filters to focus on a particular store, buyer group, or promotion field. Quickly see which promotions are active, and change the status of multiple promotions at the same time. Create promotions or edit existing ones.

Manage Buyers and Shoppers in the Customer Workspace

The Customer Workspace displays accounts enabled as buyers and the accounts of registered shoppers for B2C stores. The Customer Workspace also displays buyer groups. Using the Customer Workspace, you can assign customers to buyer groups and assign buyer groups to stores. You can add filters and adjust which columns to display in the workspace.

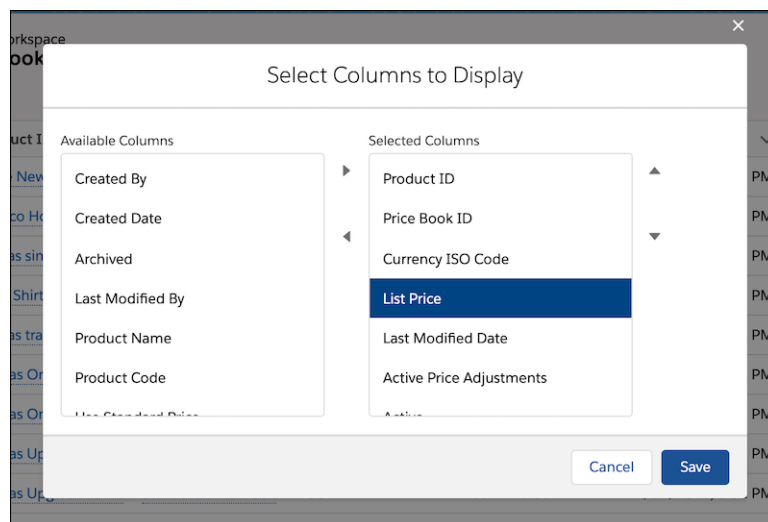
Add a Commerce Workspace

You can add a Commerce app workspace to your navigation menu.

Manage Pricing in the Pricing Workspace

You can manage all price books and price book entries in your organization in the Pricing Workspace. You can filter the list by a specific store.

1. From the Commerce App navigation menu, select **Pricing Workspace**.
If you don't see the Pricing Workspace in your navigation menu, manually add it. See [Add a Commerce Workspace](#) on page 173.
2. Customize the information displayed.



- a. Click the gear icon, and select **Select Columns to Display**.

EDITIONS

Available in: Lightning Experience

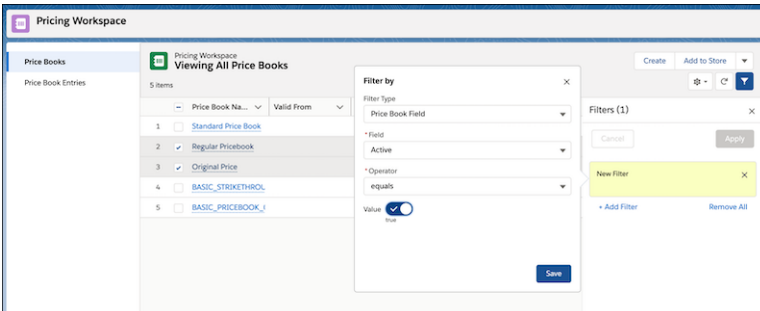
Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

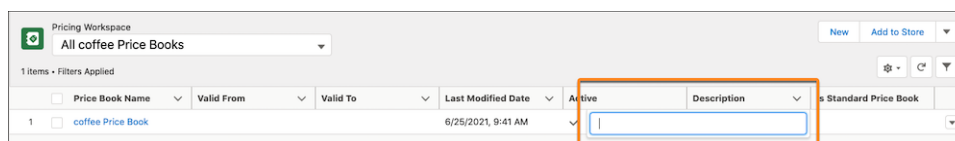
- b. Use the arrows to move items between Available Columns and Selected Columns.
- c. Click **Save**.

You can change the column view for price books and price book entries separately.

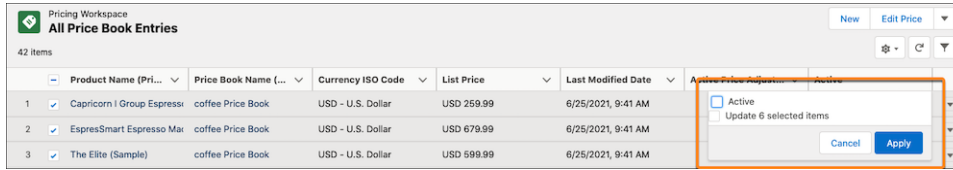
3. From the left pane, select **Price Books**.
 - To create a price book, click **New** at the top of the screen.
 - To associate a price book to a store, click **Add to Store**.
4. Create a filtered list to surface price books or price book entries with specific properties or associations.



- a. Click the filter icon.
 - b. Click **Add Filter**.
 - c. Select a filter type, and edit the filter values as needed.
 - d. After you create your filter, click **Save**.
 - e. To apply the filter, click **Apply**.
5. Apply an action to one or more price books in the list.
 - a. Check the box next to the price book or price books you want to update.
 - b. Click the dropdown arrow in the action buttons at the top of the screen.
 - c. Select an action.
 6. Edit one or more fields in the price book or price book entry list.
 - a. To open a field for editing, hover your cursor over the field and click the pencil icon.



- b. To update multiple fields with the same value, select the items, click the pencil icon, and then select the option to update all selected items.



c. Click **Save**.

7. Select **Price Book Entries** from the left pane.

- To create a price book entry, click **New** at the top of the screen. When you create entry, associate it with a price book.
- To change multiple prices at once, select the price book entries and then click **Edit Price**. Choose to change pricing by a percentage or by a set amount. For example, reduce all prices by 10% or \$10.00.

SEE ALSO:

[Commerce Workspaces](#)

Manage Products in the Product Workspace

The Product Workspace displays all products in your organization. You can add filters and adjust which columns to display. You can also create your own lists. Update multiple products, add new products, edit fields for products, and create variation products.

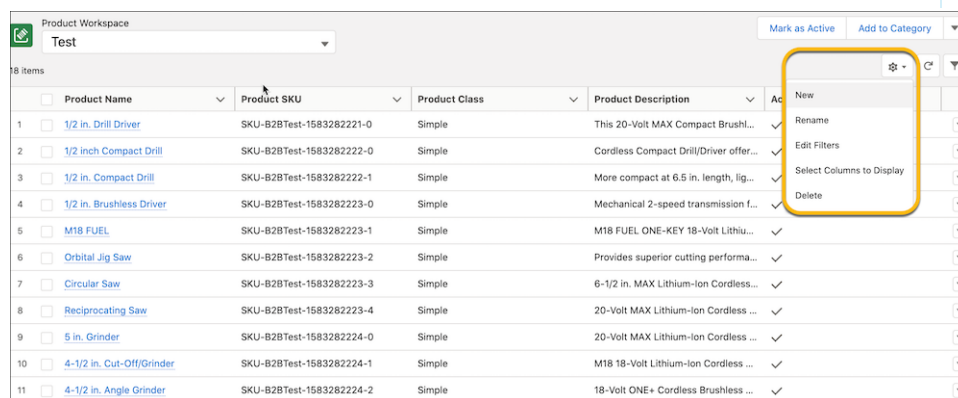
1. From the Commerce App navigation menu, select **Product Workspace**.

EDITIONS

Available in: **Lightning Experience**

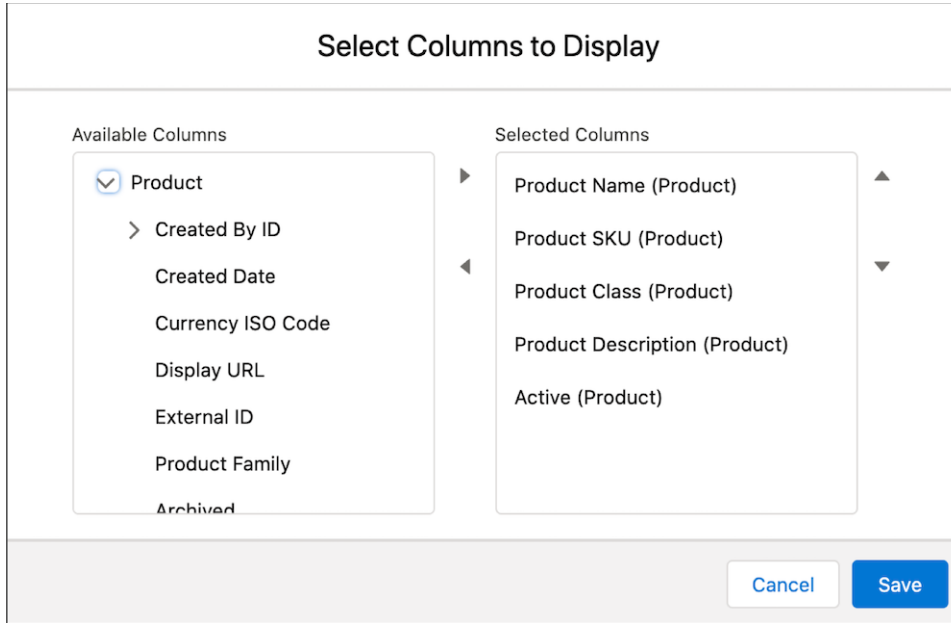
Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: **B2B Commerce and D2C Commerce**



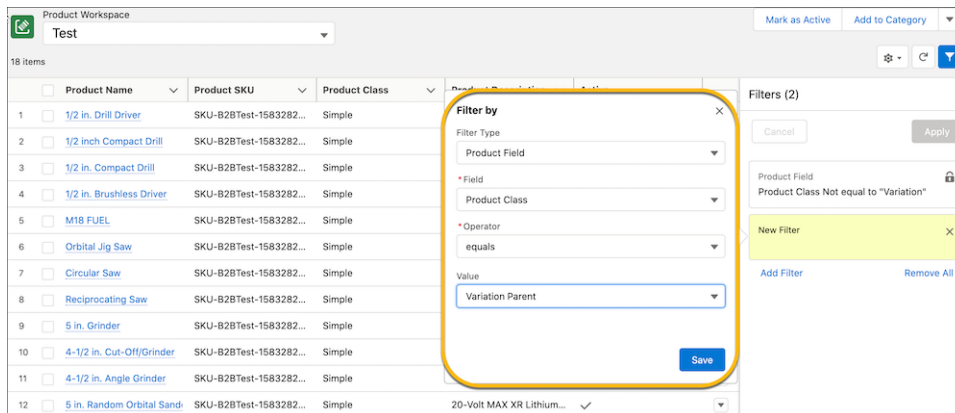
2. Customize the information displayed in the workspace.

- Click the gear icon, and select **Select Columns to Display**.
- Use the arrows to move items between Available Columns and Selected Columns.



c. Click **Save**.

3. Create a filtered list to display products with specific properties or associations.



a. Click the filter icon. You can also click the gear icon and select **Edit Filters**.

b. Click **Add Filter**.

c. To quickly view product assignments, you can select a standard filter type. To customize a filter, select **Product Field**. Select the field to filter, and select the operator and the value.

d. Click **Save**.

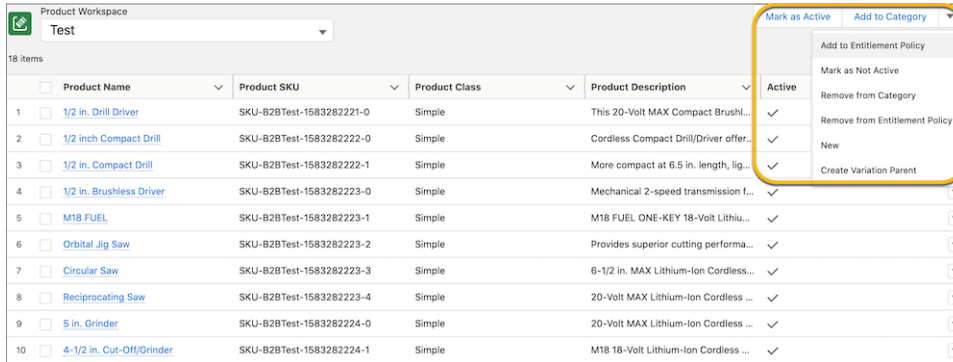
e. To apply the filter to your list of products, click **Apply**.

4. To create a hybrid list, click the gear icon and select **New**.

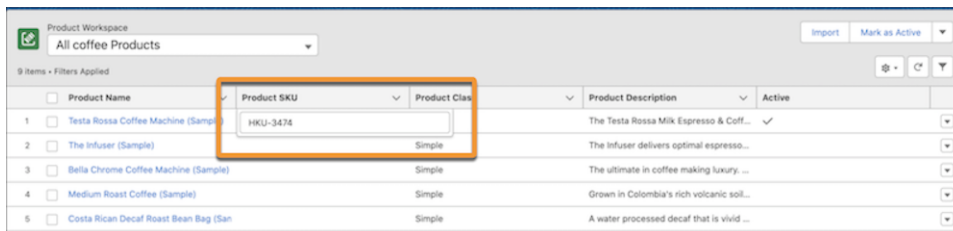
a. Name your list, and click **Save**.

b. To customize the list's columns and filters, repeat Steps 2 and 3.

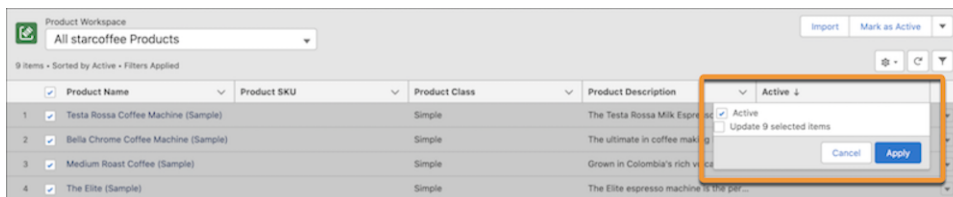
5. You can apply an action to one or more products in the list.
 - a. Check the box next to the product or products you want to update.
 - b. Click an action button at the top of the screen. Click the dropdown arrow next to the action buttons if the action you're looking for isn't shown.



- c. Select an action.
6. Edit one or more fields in the product list.
 - a. To open a field for editing, hover your cursor over the field and click the pencil icon.



- b. To update multiple fields with the same value, select the items to be edited, click the pencil icon, and then select the option to update all selected items.



- c. Click **Save**.
7. To add a product to the workspace, click **New** from the action buttons at the top of the screen, and enter the product details.

- To add a variation parent product, click **Create Variation Parent**. Select the product attribute set to associate with the variation parent product, enter the product details, and save your changes.

SEE ALSO:

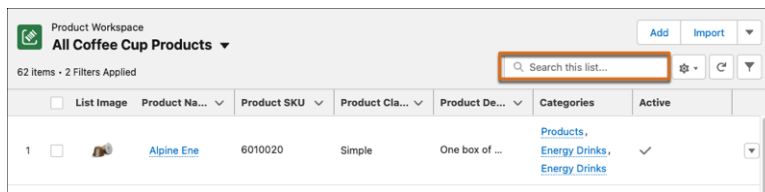
[Commerce Workspaces](#)

[Search the Product Workspace](#)

Search the Product Workspace

Use the search box to search fields in the product workspace.

- From the Commerce App navigation menu, select **Product Workspace**.
- Type the term you want to search in the search box.



The system searches for the term in all indexed columns, for example, all columns with text fields.

You can use wildcards, operators, and reserved characters. For example, you can enter these search terms.

- ("Blue" AND "Shirt")*—Finds products with the words blue and shirt in any product field.
- 60100**—Finds SKUs with 60100 as the first numbers.
- Sip \&Go*—Finds product with the name Sip&Go. Because the & character is a reserved character, insert a backslash (\) to indicate the literal & character and not the reserved character.

For information about which wildcards, operators, and reserved characters you can use in the product workspace search box, see [FIND {SearchQuery}](#).

After 2 minutes, the search times out. To decrease the time required for searching, try narrowing the search term.

SEE ALSO:

[Manage Products in the Product Workspace](#)

[Discover Your Searchable Fields by Object in Lightning Experience](#)

[Make Additional Fields Searchable](#)

EDITIONS

Available in: Lightning Experience


Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

Manage Promotions with the Promotion Workspace

The Promotion Workspace consolidates all your promotions in one place. You can use filters to focus on a particular store, buyer group, or promotion field. Quickly see which promotions are active, and change the status of multiple promotions at the same time. Create promotions or edit existing ones.

1. From the Commerce App navigation menu, select **Promotion Workspace**.
If you don't see the Promotion Workspace in your navigation menu, manually add it. See [Add a Commerce Workspace](#) on page 173.
2. Choose which information to display by adding or removing columns.
 - a. Click the gear icon, and select **Select Columns to Display**.
 - b. Use the arrows to move items between Available Columns and Selected Columns.
 - c. Click **Save**.
3. To filter the list:
 - a. Click the filter icon, and select **Add Filter**.
 - b. Select **Promotions Assigned To** or **Promotion Field**.
 - c. Select the operator and value.
 - d. Click **Save**.
 - e. To apply the filter to your list of promotions, click **Apply**.
4. To create a promotions list, click the gear icon, select **New**, name the list, and save it
5. To activate or deactivate one or more promotions:
 - a. Select the promotions.
 - b. Click an action button at the top of the screen. If the action that you're looking for isn't displayed on the screen, click the dropdown arrow next to the action buttons.
 - c. Choose whether to activate or deactivate the promotion.

 **Note:** When a customer adds products to the cart, Salesforce evaluates the first 50 active manual promotions and the first 50 active automation promotions for the customer's account to determine if they apply. To improve performance, we recommend activating and prioritizing only the promotions that you need.
6. To edit a field in a promotion or promotion list, hover your cursor over it, and click the pencil icon.
To update multiple fields with the same value, select the items to be edited, click the pencil icon, and then select the option to update the selected items.
7. To add a promotion to the workspace, click **New** from the action buttons at the top of the screen, and enter the promotion details.

SEE ALSO:

[Commerce Promotions](#)

[Commerce Workspaces](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

Manage Buyers and Shoppers in the Customer Workspace

The Customer Workspace displays accounts enabled as buyers and the accounts of registered shoppers for B2C stores. The Customer Workspace also displays buyer groups. Using the Customer Workspace, you can assign customers to buyer groups and assign buyer groups to stores. You can add filters and adjust which columns to display in the workspace.

For the Customer Workspace to display correctly, the Salesforce admin must add buyer groups as a related list on the Account page layout.

1. From the Commerce App navigation menu, select **Customer Workspace.**

If you don't see the Customer Workspace in your navigation menu, manually add it. See [Add a Commerce Workspace](#) on page 173.

The Customers tab lists accounts enabled as buyers, registered shoppers, and the buyer groups assigned to accounts. The Buyer Groups tab lists buyer groups and stores assigned to the buyer groups.

- 2.** To add a customer account to the workspace, go to the accounts list and enable the account as a buyer.
- 3.** To add or remove accounts from buyer groups, click **Add to Buyer Group** or **Remove from Buyer Group** at the top of the customer list.
- 4.** To add a buyer group to the workspace, at the top of the Buyer Groups tab, click **New** and enter the buyer group details.
- 5.** To add a buyer group to a store, at the top of the buyer group list, click **Add to Store**.
- 6.** Customize the information displayed in the workspace.
 - a.** Click the gear icon, and select **Select Columns to Display**.
 - b.** Use the arrows to move items between Available Columns and Selected Columns.
 - c.** Click **Save**.
- 7.** To display accounts assigned to a buyer group or to filter by an account field, create a filtered list.
 - a.** Click the filter icon. You can also click the gear icon and select **Edit Filters**.
 - b.** Click **Add Filter**.
 - c.** Select the field to filter, and select the operator and the value.
 - d.** Click **Save**.
 - e.** To apply the filter, click **Apply**.
- 8.** Apply an action to one or more accounts or buyer groups in the list.
 - a.** Check the box next to the account or buyer group you want to update.
 - b.** Click an action button at the top of the screen.

SEE ALSO:

[Commerce Workspaces](#)

[Manage Buyer Access to B2B Stores](#)

EDITIONS

Available in: Lightning Experience

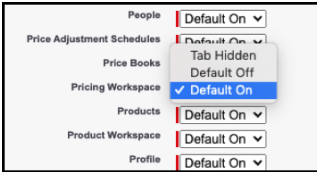
Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

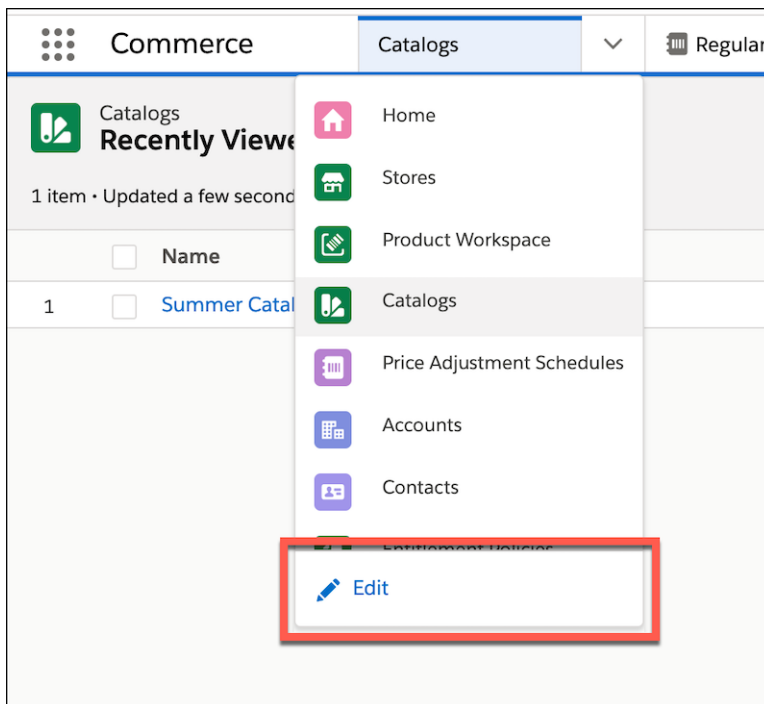
Add a Commerce Workspace

You can add a Commerce app workspace to your navigation menu.

1. From Setup, in the Quick Find Box, enter *Users*, and select **Profiles**.
2. Find the profile where you want to display the workspace, and select **Edit**.
3. Under Tab Settings, find the workspace and select **Default On** from the dropdown.



4. Save your profile.
5. Add the workspace to your navigation menu.
 - a. Navigate to the Commerce app.
 - b. From the navigation dropdown menu, and select **Edit**.



- c. Click **Add More Items**.
- d. Select the workspace, and select **Add (#) Nav Items**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce


- Repeat this process for each profile that you want to give access to the workspace.

SEE ALSO:

[Commerce Workspaces](#)

Migrate Your Store Configuration

After you configure your store, you can move its configuration to a new environment, for example, from sandbox to production, by creating a change set. The change set includes the store's metadata, such as descriptions, localization, pricing, and search settings.

 **Note:** Sending a change set between two orgs requires a deployment connection. You can send sets only between orgs that are affiliated with a production org. For example, a production org and a sandbox, or two sandboxes created from the same org, can send or receive change sets. For more information, see [Deployment Connections for Change Sets](#).

- Export the store that you want to migrate.
 - From the store's home page, select **Administration > General Settings**.
 - In the Store Migration section, under Export Store Configuration, click **Export**.
- Create an outbound change set.
 - In Setup, in the Quick Find box, enter *change sets*, and select **Outbound Change Sets**.
 - Click **Continue**, and then click **New**.
 - Add a name and description for your change set, and click **Save**.
 - Under Change Set Components, click **Add**.
 - For Component Type, select **Site.com**.
 - Select the store that you want to migrate, and click **Add to Change Set**.
 - Click **Add**, and for Component Type, select **Store Configuration**.
 - Make sure that your store is still selected, and click **Add Change Set**.
- Apply the store configuration to a new environment.
 - Go to the environment where you want to migrate the store configuration.
 - In Setup, navigate back to Change Sets, and select **Inbound Change Sets**.
 - Click **Continue**, select the change set that you created, and click **Deploy**.
 - Navigate to the Commerce app navigation menu, and select **Store > Administration > General Settings**.
 - Under Apply Store Configuration, click **Apply**.
 - Select the store configuration, and click **Apply**.

SEE ALSO:

[Store Management](#)

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited,** and **Developer Editions**

Available in: B2B Commerce and D2C Commerce

Commerce Analytics

Take action on insights about revenue, product performance, and customer behavior from Commerce Analytics dashboards.

Set Up Commerce Analytics Dashboards

Use Commerce Analytics dashboards to monitor business performance in B2B and B2C stores. To set up the preconfigured Business Overview dashboard, install the required Commerce Dashboards and Commerce Reports folders.

Interpreting Commerce Analytics Dashboards

Commerce Analytics provides preconfigured dashboards composed of Lightning reports. To quickly monitor key metrics for your stores, use the Business Overview Dashboard.

Set Up Commerce Analytics Dashboards

Use Commerce Analytics dashboards to monitor business performance in B2B and B2C stores. To set up the preconfigured Business Overview dashboard, install the required Commerce Dashboards and Commerce Reports folders.

1. From Commerce Setup, go to **Commerce Analytics > Dashboards & Reports**.
2. To get the Business Overview dashboard, click **Install**.
3. Refresh the page to check the status of the installation. When all required reports finish installation, the status changes to Installed.

EDITIONS

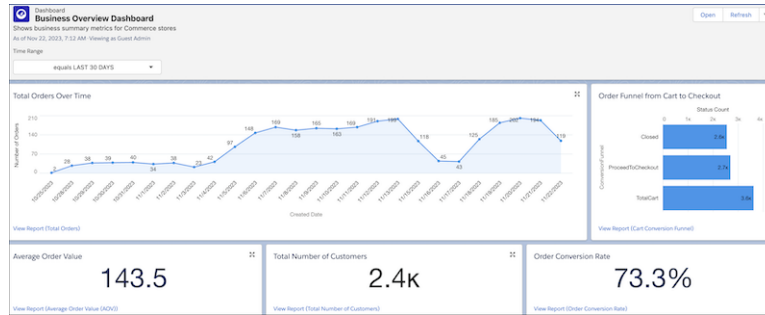
Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

Commerce Setup		
Dashboards & Reports 1 Items		
Business Overview Dashboard Installed		
Report Name	Description	Status
Cart Conversion Funnel	What percent of carts are converted from cart, to checkout, to order across all stores?	Installed
Average Order Value (AOV)	What is the average order value (AOV) for all stores? What are the trends in AOV over time?	Installed
Top Categories Sold	Which categories are ordered the most?	Installed
Top Promotions by Orders	Which promotions are applied to the most orders?	Installed
Top Products Sold	Which products are ordered the most?	Installed
Total Order Value	What is the total value of orders for all stores? What are the trends over time?	Installed
Order Conversion Rate	What percent of carts are converted to orders in all stores?	Installed
Top Coupons by Orders	Which coupons are applied to the most orders?	Installed
Total Number of Customers	How many customers do we have in all stores? What are the trends over time?	Installed

4. From the App Launcher, search for and select **Dashboards**.
5. Go to **All Dashboards** and click **Business Overview Dashboard**.
6. Use the time range dropdown to apply time range filters to all the reports in the dashboard.
7. Click on a report within the dashboard to open it in Report Viewer, where you can make customizations like changing the chart type or adding filters.



SEE ALSO:


[Interpreting Commerce Analytics Dashboards](#)

Interpreting Commerce Analytics Dashboards

Commerce Analytics provides preconfigured dashboards composed of Lightning reports. To quickly monitor key metrics for your stores, use the Business Overview Dashboard.

Business Overview Dashboard

The Business Overview Dashboard includes these reports.

 **Note:** The default currency used in the Business Overview Dashboard is USD. If your store uses multiple currencies, a conversion is applied to aggregate the calculations.

Report Name	Description
Total Orders	The total number of orders placed in your store or stores. Use the Total Orders report to track sales trends by charting the metric over different time periods.
Order Funnel	The percentage of carts converted from cart, to checkout, to order in your store or stores.
Average Order Value (AOV)	The average value of orders placed by customers in your store or stores. Order value excludes the cost of tax and shipping. Use the AOV and Total Order Value reports to assess your customers' spending habits over time.
Total Order Value	The total value of all orders placed in your store or stores. Order value excludes the cost of tax and shipping.
Total Number of Customers	The total number of customers for your store or stores over time. The number is calculated as the count of unique customer IDs from purchases within the specified timeframe.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited,** and **Developer Editions**

Available in: B2B Commerce and D2C Commerce

Report Name	Description
Order Conversion Rate	The percentage of carts converted to orders in your store or stores. Use the Order Conversion Rate and Cart Conversion Funnel to identify opportunities for improving the checkout process.
Top Categories Sold	The most popular product categories by number of orders.
Top Products Sold	The most popular products by number of orders.
Top Promotions by Orders	The promotions applied to the most orders. This calculation includes both manual and automatic promotions. Automatic promotions apply to all eligible carts. Manual promotions require a coupon code that the customer enters.
Top Coupons by Orders	The coupons applied to the most orders. This calculation includes only manual promotions.

SEE ALSO:

[Set Up Commerce Analytics Dashboards](#)

Create Custom Reports with Search and Category Data for B2B Stores

To gain insight into the products that buyers interact with, create custom reports with Google Analytics using the search and category data that Salesforce provides.

Use the data to analyze your buyers' interactions with the products in your store. Discover things like:

- What buyers are searching for most
- What buyers are searching for but not finding
- The product types that buyers are looking for
- The specific products that buyers are looking for

This table lists the data categories and the types of events that are captured.

Event Category	Event Action	Event Label	Reports On
Search Results Interactions	Search Results Page View	<i>{search term}</i>	Search term entered that resulted in the page view
	No Results Page View	<i>{search term}</i>	Search term entered that landed the user on the no-results page
	Result Click	<i>{search term}</i>	Search term entered that resulted in the clicking of a search result

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce

	Add To Cart Button Click	<i>{search term}</i>	Search term entered that resulted in the clicking of the Add to Cart button
	Category Filter Click	<i>{<search term>:<selected category name>}</i>	Search term entered and the category name that the user clicked
	Attribute Filter Click	<i>{<search term>:<selected value1,selected value2>}</i>	Search term entered and the attribute values that the user clicked
	Sort Option Click	<i>{<search term>:<sort option name>}</i>	Search term entered and the sort option that the user clicked
Product Category Interactions	Category Detail Page View	<i>{category name}</i>	Name of the category in the detail view
	Product Click	<i>{category name}</i>	Name of the category under which a product was clicked
	Add To Cart button Click	<i>{category name}</i>	Name of the category under which an Add to Cart button was clicked
	Category Filter Click	<i>{<root category name>:<selected category name>}</i>	Search term entered and the category name that the user clicked
	Attribute Filter Click	<i>{<root category name>:<selected value1,selected value2>}</i>	Search term entered and the attribute values that the user clicked
	Sort Option Click	<i>{<root category name>:<sort option name>}</i>	Root category searched and the sort option that the user clicked

For information about Google Analytics, see [Google Analytics Documentation](#).

SEE ALSO:

[Store Management](#)

Manage Integrations for Your Store

Your B2B or B2C store requires several integrations to function properly.

You can link integrations that are set up in advance by a developer. For more information, see [B2B Commerce and D2C Commerce Developer Guide](#).


1. On your store landing page, select the **Administration** tile.
2. Click the integration type that you want to manage.
Some integrations are managed from the Extensions page. See [Replace a Default Commerce Process with an Apex Class](#).
3. Click **Link Integration**.
4. Verify that you selected the correct integration, and click **Confirm**.
To change the integration, select **Edit** from the dropdown, select the integration, and save your changes. To disconnect an integration from your store, select **Unlink**.

SEE ALSO:

- [Store Management](#)
- [Getting Started With Checkout Flows](#)
- [Add a Payment Service for Store Checkout](#)
- [Add a Third-Party Shipping Service to a Commerce Store](#)
- [Add a Tax Calculation Service](#)

Set Up Inventory for Commerce Stores

To integrate inventory with your store, use Omnichannel Inventory or a custom provider. Inventory availability in your storefront is only considered when the inventory integration is turned on.

 **Note:** To enable inventory, the Web Store Inventory Source field-level security permission for the Enabled field is required. You can configure settings and select a provider without this permission.

1. On your store's home page, click the **Administration** tile.
2. In the navigation menu, select **Inventory**.
3. Enter general provider settings.
 - Location Source: Default location or location group for inventory reservations. Required.
 - Inventory Dimension: Fulfillment options.
 - On Hand: Inventory available, not counting Future Inventory or Quantity Reserved.
 - Available to Fulfill (ATF): Inventory that can be fulfilled now.
 - Available to Order (ATO): Inventory that can be ordered. Default option if no dimension is selected.
 - Reservation Duration (Seconds): Amount of time a reservation is held between 300 and 14,400 seconds. Required.
 - Inventory Cache Time To Live (Seconds): Amount of time inventory values are kept in the cache. When the time expires, the cache doesn't return a value for the requested inventory key and a new inventory value is requested. Must be between 300 and 14,400 seconds. The default setting is 2400 seconds.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited,** and **Developer Editions**

Available in: B2B Commerce and D2C Commerce

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited,** and **Developer Editions**

Available in: B2B Commerce and D2C Commerce

4. Click **Save**.

Fields that aren't required are filled with default values if left blank.

5. Configure Salesforce Omnichannel Inventory or create an extension point to connect your custom inventory provider. See [Salesforce Commerce Extensions](#).

6. To turn on inventory, click **Turn On**.

You can use AppExchange package to integrate a third-party service. If you prefer to integrate a third-party service without using AppExchange, see examples in GitHub.

- [Reference Implementations for B2B Commerce](#)
- [Reference Implementations for D2C Commerce](#)

To set up an integration, see [B2B Commerce and D2C Commerce Developer Guide](#).

Replace a Default Commerce Process with an Apex Class

Use extension points to enhance or replace default Salesforce Commerce processing with Apex classes. For example, by default Salesforce Commerce uses standard Salesforce price books to determine how products are priced. If you want to use a different pricing method, you can use an Apex class for pricing instead.

1. From your store's home page, click **Administration**.
2. Select **Extensions**.
3. On the tile that lists the extension point, click **Select Provider**.
4. Select the Apex class for the extension point.
5. Click **Next** and then confirm your selection.
6. To change or remove the provider, use the dropdown menu on the extension tile.

SEE ALSO:

[Manage Integrations for Your Store](#)

Create Email Order Confirmation Notifications

You can create an email to send to shoppers or buyers when they submit an order in a B2B or B2C store created with an LWR template. We provide examples that you can download, deploy, and customize.

1. Go to [GitHub for Commerce on Lightning](#).
2. Open and review the Order Confirmation Email Notification Implementation README file.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

Configure What Shoppers or Buyers See When a Store Isn't Available

When a CDN is enabled for your store, the Service Not Available page is available in Experience Builder for you to customize with your own brand and message. Shoppers and buyers see the Service Not Available page when your store is unavailable.

For more information about the Service Not Available page, see [Service Not Available Page](#).

SEE ALSO:

[Use Experience Builder to Customize Your Store](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

Using Salesforce Omnichannel Inventory with Commerce Stores

Configure Omnichannel Inventory, Order Management, and Salesforce Commerce so that they can work together. Learn how to use Omnichannel Inventory with commerce stores.

Refer to the following resources to guide you through using Omnichannel Inventory.

- [Salesforce Omnichannel Inventory Implementation Guide for B2C Commerce](#)
- [Set Up Inventory for Commerce Stores](#)
- [Omnichannel Inventory Help](#)

Considerations

- To use inventory with commerce stores, licenses must be purchased, permissions granted, inventory provider settings configured, and checkout pages modified.
- Be sure to add the Checkout Inventory Reservation component to your checkout page. Adding it ensures that inventory reservations are created when orders are placed.

EDITIONS

Available in: Lightning Experience and mobile devices

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce, B2C Commerce, and D2C Commerce

Commerce Promotions

Add promotions to your B2B or B2C store. Customize segments, discounts, qualifiers, and coupons to make sure that the right customers receive the right deals. Design your store pages and checkout flows to highlight promotions for eligible customers.

[Considerations for Commerce Promotions](#)

Promotions help to influence purchases and retain customer loyalty. When you create a commerce promotion, you configure the discount, when to apply it, who can receive it, and whether to require a coupon.

[Configure a Promotion](#)

Create a promotion. Then configure its segments, discounts, qualifiers, and coupons.

[Customize Promotions in Experience Builder](#)

Edit your store pages and components to customize how promotions show to eligible customers.

[Promotions in Checkout for B2B \(Aura\) Stores](#)

If you have a B2B store created using the Aura template, make sure that your checkout flow is set up to handle promotions. If your B2B store uses the LWR template, promotion functionality is already built into checkout in Experience Builder

Example Promotions

When you configure a promotion, you customize it based on what you would like customers to receive and how they qualify. The examples show you how to combine basic discount and qualifier options to create different outcomes. Use them as a starting point, try your own unique combinations, and incorporate more advanced settings to create the promotions that you need.

Prioritizing Promotions

When a cart is eligible for multiple promotions, your exclusivity and priority rules determine which promotions apply.

Remove a Promotion

You can remove a promotion from your store temporarily or permanently.

Considerations for Commerce Promotions

Promotions help to influence purchases and retain customer loyalty. When you create a commerce promotion, you configure the discount, when to apply it, who can receive it, and whether to require a coupon.

As you set up your promotion, here are some key things to consider.

- Is the promotion automatic or manual? Automatic promotions apply to all eligible carts. Manual promotions require a coupon code that the customer enters.
- Who is it for? Use segments to associate your promotion with one or more stores and, if necessary, specific buyer groups.
- What will the customer receive? Specify which products to target and how much to deduct from the price.
- What must a customer purchase to receive the promotion? Use promotion tiers and qualifier rules to set quantity or price minimums.
- How do you want your promotion to appear to customers? Customize your cart page and other details in Experience Builder. If you're working with a B2B store created with the Aura template, configure your checkout to include promotions.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

Usage Notes

- The Promotion object is shared between Commerce, Loyalty, and Retail Execution platforms in Salesforce.
- For a B2B store created with the Aura template, make sure that your checkout flow is set up to include promotions. See [Add a Checkout Flow to a B2B Store](#).
- Customers are eligible for 24 product-level promotions and one order-level promotion per cart. This limit includes a maximum of two coupons.
- Each line item in a cart is eligible for only one product-level promotion.
- If a cart includes an item with a negative price value, the cart isn't eligible for a promotion.
- Promotions aren't evaluated or applied for carts that contain more than 10,000 items.

SEE ALSO:

[Commerce Promotions](#)

Configure a Promotion

Create a promotion. Then configure its segments, discounts, qualifiers, and coupons.

[Create a Promotion](#)

When you create a base promotion, you can activate immediately or at a later time.

[Create Promotions with Einstein](#)

Use Einstein and Commerce Cloud data to draft promotions with just a few clicks. Quickly create basic and advanced promotions using natural language instructions and generative AI.

[Add a Promotion Segment](#)

Use segments to associate your promotion with stores and buyer groups. Customers see the promotion if they're a member of any of the assigned stores or buyer groups. You can apply one promotion segment at a time to a store. A promotion segment can have up to 50 automatic and 50 manual active commerce promotions.

[Add a Promotion Tier](#)

Use promotion tiers to create progressive discounts for a promotion. Apply the highest qualifying tier to a cart. You can add tiers only to a promotion that was created as a tiered promotion. All discounts within a tier must be of the same type. You can create up to 10 tiers per promotion.

[Create a Coupon](#)

Share coupon codes that customers can manually redeem in your store. The coupon has the same segment, discount, and qualifier rules as the promotion that it's associated with.

[Define Promotion Discounts](#)

Set a target for your promotion discount, choose an adjustment type, and specify how much to deduct.

[Choose What Qualifies for a Promotion](#)

Set quantity or price minimums to add purchase requirements to your promotion.

[Localize Promotion Data](#)

You can manually enter translated text for promotion names, display names, and terms and conditions if you have Data Translation enabled.

Create a Promotion

When you create a base promotion, you can activate immediately or at a later time.

1. From the Commerce app navigation menu, select **Promotion Workspace**.
2. Click **New**.
3. Add the promotion details.
 - a. For Name, enter the internal name for your promotion.
 - b. For Display Name, enter a name that customers see in the cart when the promotion is in effect.
If you leave it blank, customers don't know what discount they receive.
 - c. Enter a priority number.
The priority number determines which promotions apply first. The lower the number, the higher the priority. If you don't enter a priority number, or if two applied promotions have the same priority, prioritization tiebreaker rules apply. See [Promotion Prioritization](#) on page 209.
 - d. If you want to use qualifiers, from the Qualifier Criteria dropdown, select which qualifiers to apply: Any or All.
 - e. To activate the promotion as soon as you save it, select **Active**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

To improve performance, we recommend activating and prioritizing only the promotions that you're using. When a customer adds products to the cart, Salesforce evaluates the first 50 active manual promotions and the first 50 active automatic promotions for their account to determine if they apply.

- f. Select **Commerce Promotion**.
 - g. To combine the promotion with other promotions, for Exclusivity Type, select **No**.
To prevent combining the promotion with promotions of the same class (for example, you want one product promotion per product or one transaction promotion per order), select **Class**. To let it be the only promotion used for an entire order, select **Global**. To use the default setting (Class), select **–None–**. See [Promotion Prioritization](#) on page 209.
 - h. Enter the terms and conditions, which you can choose to show in the cart.
To localize the promotion display name and terms and conditions, use the Translation Workbench. See [Translation Workbench](#).
 - i. Select whether to exclude qualifying items from discounts.
4. Select when to start and end the promotion.
 5. Add promotion type details.
 - a. To have the promotion automatically apply when qualifiers are met, select **Automatic**. If you're requiring a coupon code, don't select **Automatic**.
If there are no qualifiers, the promotion applies only when eligible targets are in the cart.
 - b. To make it a tiered promotion, select **Tiered Promotion**.
This setting is permanent and can't be changed after you save the promotion. See [Add a Promotion Tier](#) on page 187.
 6. Add the redemption details.
 - a. Enter the maximum number of times that the promotion can apply to a cart. The default is 1.
 - b. Select whether the promotion is automatic and applies to eligible carts without a coupon. If you plan to create coupons for your promotion, don't select this option.
 7. Save your work.



Example: To help your customers through the upcoming heat wave, you want to hold a sale on cooling units next week. You have a summer general sale in progress, but you want to prioritize the cooling unit promotion. When you add a promotion:

- For Priority Number, enter *1*.
- Make sure that your other active promotions have a lower priority number.
- Select **Active**.
- Enter when to start and end the promotion.
- To apply the discount when the customer adds an eligible cooling unit to their cart, select **Automatic**.

SEE ALSO:

[Manage Promotions with the Promotion Workspace](#)

[Commerce Promotions](#)

[Add a Promotion Tier](#)

Create Promotions with Einstein

Use Einstein and Commerce Cloud data to draft promotions with just a few clicks. Quickly create basic and advanced promotions using natural language instructions and generative AI.

To use generative AI, first turn on Einstein Generative AI. The EinsteinGPTCommerceAddOn license is also required to create Commerce promotions with Einstein.

1. From the Commerce app navigation menu, select **Promotion Workspace > Draft with Einstein**.
2. On the Promotion Preview screen, select a store.
3. Add instructions to the promotion, such as the targeted product, category, or order and the discount or offer.
 - To use one of the provided examples, in the Use Examples section, click **+**.
 - To use your own instructions, enter natural language text in the box to describe the promotion. To add products or categories, click **Select products or categories** and use the search function. To add the product or category to your instruction, click **+**. After adding your items, click **Insert**.
4. Click **Draft Promotion** and preview the draft.
You can edit the instructions in the box. To update the details, click **Draft Promotion**.
5. To create the promotion, verify the details, and then click **Save**.
6. Verify that the promotion details are correct on each tab (segments, discounts, qualifiers, and so on).
7. When you're ready to activate the promotion, click **Active**.
The promotion isn't available on your store until you activate it.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer Editions**

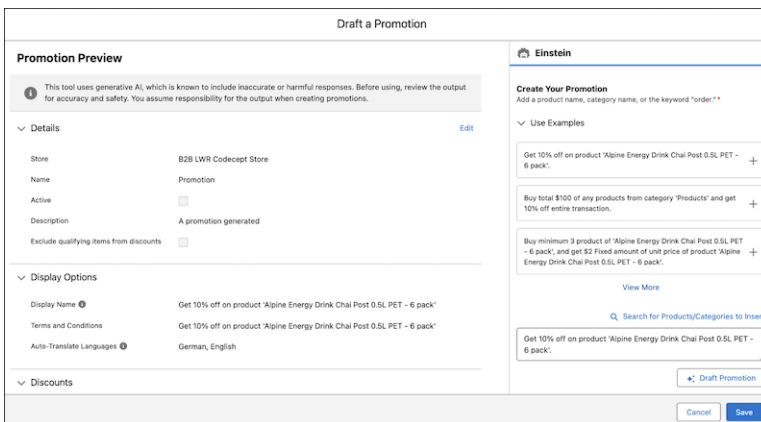
Available in: B2B Commerce and D2C Commerce

USER PERMISSIONS

To create promotions with Einstein:

- Smart Commerce Promotions and Recommendations

Example:



When creating promotions with Einstein, use natural language. Include specific words and phrases in your instructions.

Table 5: Troubleshoot and Craft Promotions with Einstein

Words and Phrases	Instruction Example
To identify a category or product, use the term "category" or "product" and put the item in single quotes.	Get 25% off product 'tennis shoes'.

Words and Phrases	Instruction Example
For buy 1 get 1 promotions, use “BOGO” in the instructions.	BOGO deal: Buy an ‘Alpine Energy Drink’ and get \$5 off the second one.

Use the exact adjustment type name in your instructions.

Adjustment Type	Instruction Example
Fixed amount off unit price	This is a summer promotion! Get a fixed \$25 off unit price on product ‘Tennis Shoes’.
Fixed amount off transaction	Special loyal customer promotion! Get a fixed \$50 off the transaction.
Fixed amount off line item total	Enjoy this tennis essentials promotion. Buy any items in category ‘Tennis Rackets’ and get a fixed \$50 off line item total.
Percentage discount	Enjoy this summer promotion! Buy a minimum of 2 product ‘Tennis Shoes’ and get 25% off.
Fixed price	Enjoy this tennis essentials promotion. Buy any product from the category ‘Tennis Balls’ and get it for fixed \$3.

SEE ALSO:

[Einstein Generative AI](#)

[Einstein Generative AI & Trust](#)

[Enable Einstein Generative AI](#)

Add a Promotion Segment

Use segments to associate your promotion with stores and buyer groups. Customers see the promotion if they’re a member of any of the assigned stores or buyer groups. You can apply one promotion segment at a time to a store. A promotion segment can have up to 50 automatic and 50 manual active commerce promotions.

When you assign a promotion segment to a buyer group, don’t assign the same promotion segment to a store. If you do, all the store customers are eligible to receive all the promotions related to that segment rather than just the members of the buyer group. Instead, associate the buyer group to the store.

You can’t change the association between a promotion and a promotion segment. Instead, delete the promotion market segment and create a new one.

Although a promotion is related to a promotion segment, you can’t change the Commerce Promotion or Automatic settings for the promotion. Delete the promotion segment from the promotion and then change the settings.

You can’t change the association between a promotion segment and a buyer group. Instead, delete the buyer group and assign a different one to the promotion segment.

1. From the Commerce app navigation menu, select **Promotion Workspace**.
2. Select the promotion.


EDITIONS

Available in: Lightning Experience

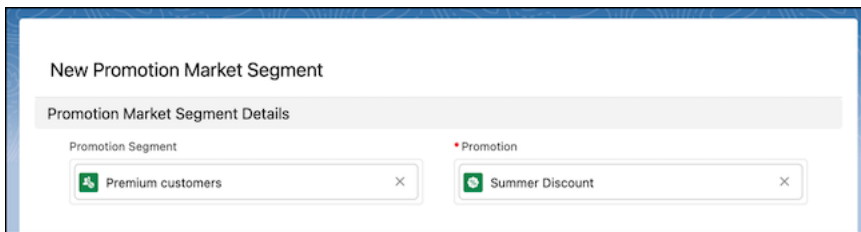
Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

3. On the Segments tab, click **Add Promotion Segment**.
4. Click the Promotion Segment field, and select **New Promotion Segment**.
You can also use an existing segment. Select it, save your work, and you're done.
5. Enter a name for the segment, and click **Save**.
6. Click **Save** again.
7. Navigate to your segment, and select the **Related** tab.
8. Click **Assign** next to the stores or buyer groups option.
9. Select at least one store or buyer group. If selecting a buyer group, make sure it's assigned to the store.
10. Save your work.

 **Example:** To kick off the summer shopping season this May, you want to offer a 30% discount to the Premium customers buyer group in your B2C store. When you create a promotion segment:

- From the Promotion Segment dropdown menu, select **Premium customers**. This segment includes your B2C store and your Premium customers buyer group.
- From the Promotion dropdown menu, select **Summer Discount**.




SEE ALSO:

[Commerce Promotions](#)

Add a Promotion Tier

Use promotion tiers to create progressive discounts for a promotion. Apply the highest qualifying tier to a cart. You can add tiers only to a promotion that was created as a tiered promotion. All discounts within a tier must be of the same type. You can create up to 10 tiers per promotion.

 **Important:** Tiers can only be used for promotions that were created as tiered promotions.

1. From the Commerce app navigation menu, select **Promotion Workspace**.
2. Select the tiered promotion.
3. On the Tiers tab, click **New**.
4. Enter a promotion tier name.
5. Select the promotion you want the tier to be assigned to.
6. Enter a rank.
The rank determines which tier applies first. The lower the number, the better the discount.
7. Click **Save**.
8. Navigate to the promotion tier and select the **Related** tab.


EDITIONS

Available in: **Lightning Experience**

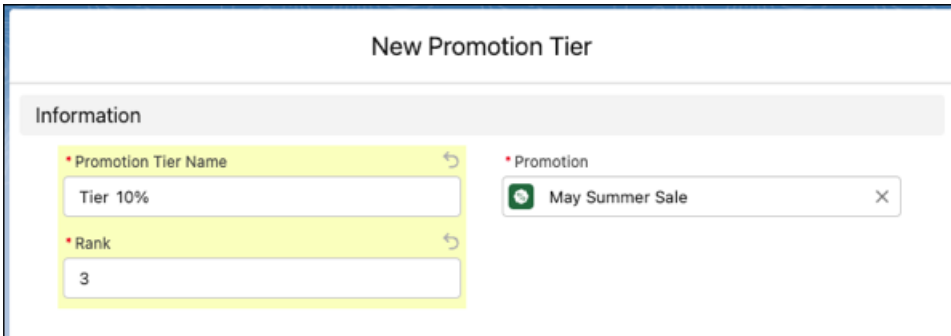
Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: **B2B Commerce and D2C Commerce**

9. To add discount details for the tier, click **New** next to Discounts. See [Define Promotion Discounts](#) on page 189.
10. To add qualifier details for the tier, click **New** next to Promotion Qualifiers. See [Choose What Qualifies for a Promotion](#) on page 191.
11. Repeat these steps to create each tier.

 **Example:** To entice shoppers to purchase more, you want to give a better discount as the shopper adds more to their cart. You create three promotion tiers that give the shopper 10% off a \$50 purchase, 20% off a \$100 purchase, or 30% off a \$200 purchase. When you create your promotion, select **Tiered Promotion** and then:

- Create a tier for each discount level and associate it with the tiered promotion.
- Assign the best discount to the lowest rank.
- Add your discounts and promotion qualifiers to each tier.



SEE ALSO:

[Commerce Promotions](#)

Create a Coupon

Share coupon codes that customers can manually redeem in your store. The coupon has the same segment, discount, and qualifier rules as the promotion that it's associated with.

A customer can apply up to three coupons per cart. Only manual promotions use coupons. To set a promotion to manual, deselect **Automatic**.

1. From the Commerce app navigation menu, select **Promotion Workspace**.
2. Select the promotion.
3. On the Coupons tab, click **New**.
4. Enter a coupon code. This code is what customers use to redeem the promotion.
5. Enter an optional description that customers don't see.
6. Use the Status dropdown to set the coupon as active or inactive.
7. (Optional) Enter a redemption limit per buyer or for the maximum number of uses across all buyers.
When the coupon meets your specified limit, it's no longer valid. When you specify an all-buyer coupon limit, the limit per buyer can't exceed it.
8. (Optional) Enter the start and end date and time for the coupon.
9. Save your changes.

EDITIONS

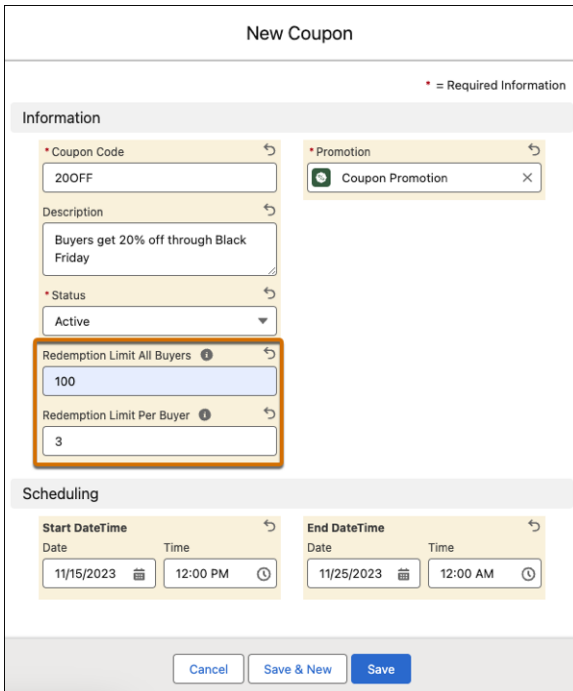
Available in: **Lightning Experience**

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: **B2B Commerce and D2C Commerce**

 **Example:** With your Black Friday promotion, you want to create a coupon code called 20OFF that a limited number of customers can redeem manually days prior and through the biggest shopping day of the year.

- Enter *20OFF* for the Coupon Code and *Black Friday* as the associated promotion.
- Set the status to **Active**.
- Enter *100* as the redemption limit for all buyers and *3* as the redemption limit per buyer.
- Enter *11/15/2023 at 12:00 AM* as the start date and time and *11/25/23 at 12:00 AM* as the end date and time.



New Coupon

* = Required Information

Information

* Coupon Code: 20OFF

* Promotion: Coupon Promotion

Description: Buyers get 20% off through Black Friday

* Status: Active

Redemption Limit All Buyers: 100

Redemption Limit Per Buyer: 3

Scheduling

Start DateTime: 11/15/2023 12:00 PM

End DateTime: 11/25/2023 12:00 AM

Buttons: Cancel, Save & New, Save

SEE ALSO:

[Commerce Promotions](#)

Define Promotion Discounts

Set a target for your promotion discount, choose an adjustment type, and specify how much to deduct.

1. From the Commerce app navigation menu, select **Promotion Workspace**.
2. Select the promotion.
3. On the Discounts tab, click **New**.
4. To find a specific product or product category that you want to discount, search the **Target** field.
 - To discount individual products, from the Target dropdown, select **Products**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

- To discount a subsection of products in a catalog, from the Target dropdown, select **Categories**. Promotions assigned to product categories automatically apply to variant products.
 - To discount the entire order, leave the Target field empty.
5. Select a target type that matches the target that you selected. If you left the Target field empty, select **Transaction**.
A promotion can have multiple product targets as long as they share a target type.
 6. Select an adjustment type.
 - Percentage Discount—Deducts a percent from the price of a product or transaction.
 - Fixed Amount Off Unit Price—Deducts a currency amount off a single unit of a product.
 - Fixed Amount Off Line Item Total—Deducts a currency amount off a line item total.
 - Fixed Amount Off Transaction—Deducts a currency amount off the entire order.
 - Fixed Price—Designates a promotional price for a product.
 - Total Fixed Price—Designates a promotional price for a set of products.
 7. Enter the adjustment percent or amount, depending on the type of adjustment that you selected.
If you enter an amount and your account is multi-currency, choose a currency.
 8. Enter a quantity limit to restrict the number of products that can receive the discount. The default quantity is unlimited.
 9. (Optional) To require the customer to meet the limit to be eligible for the promotion, select **Apply discount only when a cart reaches the quantity limit**.
 10. Save your work.



Example: As your U.S. customers start planning their summer camping trips, you want to provide a 10% discount on all insulated goods in your store. When you create a promotion target:

- From the Target dropdown, select **Categories**.
- For Target, select **Insulated**.
- For Target Type, select **Product Category**.
- For Adjustment Type, select **Percentage Discount**.
- For Currency ISO Code, select **USD - U.S. Dollar**.
- For Adjustment Percent, enter **10**.

SEE ALSO:

[Commerce Promotions](#)

Choose What Qualifies for a Promotion

Set quantity or price minimums to add purchase requirements to your promotion.

You can have up to 200 product qualifiers, 25 product category qualifiers, and 1 transaction total qualifier per promotion.

1. From the Commerce app navigation menu, select **Promotion Workspace**.
2. Select the promotion.
3. On the Qualifiers tab, click **New**.
4. To find a specific product or product category, search the Qualifier field.
 - To base your qualifier on a specific product, from the Qualifier dropdown, select **Products**.
 - To base your qualifier on a subsection of products in a catalog, from the Qualifier dropdown, select **Categories**. If you want the category qualifier to apply to variant products, manually add each variation to the category from the Category page.
 - To base the qualifier on only the transaction total, leave the Qualifier field empty.
5. Choose a qualifier type that matches the qualifier that you selected. If the Qualifier field is empty, select **Transaction Total**.
6. Limit your promotion with either a quantity or price minimum.

Quantity minimums support decimal amounts up to four places.


EDITIONS

Available in: Lightning Experience

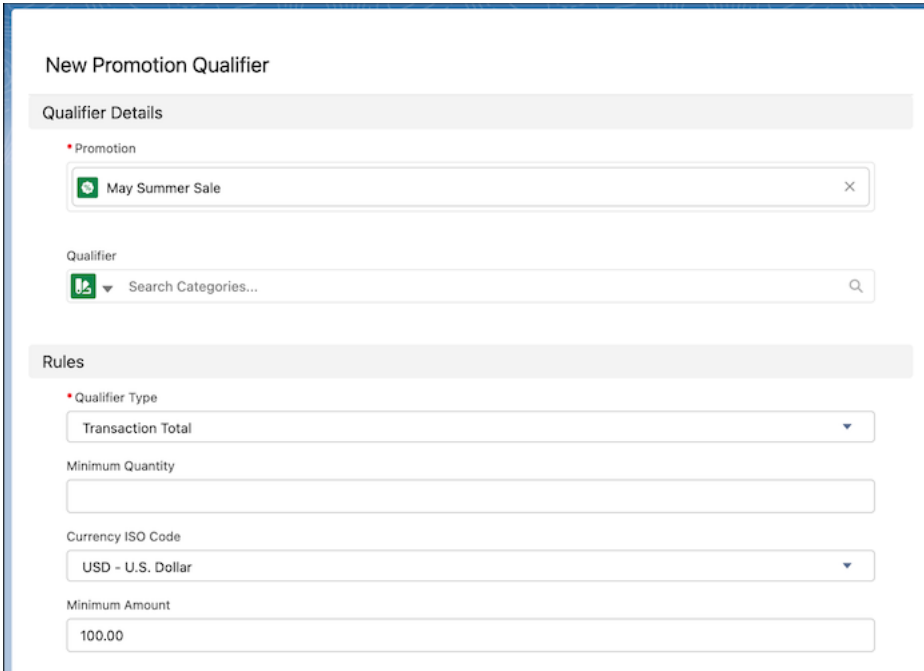
Available in: **Enterprise**, **Unlimited**, and **Developer Editions**

Available in: B2B Commerce and D2C Commerce

7. Save your work.

 **Example:** To encourage larger purchases, you want to discount all orders over \$100, no matter what's in the order. When you create a promotion qualifier:

- Leave the Qualifier field empty.
- Under Qualifier Type, select **Transaction Total**.
- For Currency ISO Code, select **USD - U.S. Dollar**.
- Under Minimum Amount, enter *100*.



New Promotion Qualifier

Qualifier Details

• Promotion
May Summer Sale

Qualifier
Search Categories...

Rules

• Qualifier Type
Transaction Total

Minimum Quantity

Currency ISO Code
USD - U.S. Dollar

Minimum Amount
100.00

SEE ALSO:

[Commerce Promotions](#)

Localize Promotion Data

You can manually enter translated text for promotion names, display names, and terms and conditions if you have Data Translation enabled.

1. Go to the promotion that you want to add translations to.
2. Click the **Translations** tab.
The Translations tab is available when you have Data Translation enabled for your org.
3. Click **Add Translation**.
4. Select the language, and enter the translated promotion name, display name, and terms and conditions.
5. Click **Save**.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available In: B2B Commerce and D2C Commerce

- To load the translation, refresh the store page.

SEE ALSO:

[Enable Data Translation](#)

Customize Promotions in Experience Builder

Edit your store pages and components to customize how promotions show to eligible customers.

Here are some ways that you can customize promotions in Experience Builder.

- Highlight product- and order-level savings by modifying the Cart and Promotions components on the Cart page.
- Add a Coupons component to let customers apply manual promotions to their cart.
- Show a promotions subtotal in the Cart Summary component.

SEE ALSO:

[Checkout Promotion Processing](#)

Promotions in Checkout for B2B (Aura) Stores

If you have a B2B store created using the Aura template, make sure that your checkout flow is set up to handle promotions. If your B2B store uses the LWR template, promotion functionality is already built into checkout in Experience Builder.

When you create a B2B store that uses the Aura template, you can base your checkout flow on an example that includes promotions. If you created your B2B store before Winter '22, you can follow a multiple-step process to add promotion handling to your existing checkout flow.

After you configure your checkout flow with promotions, select it in the Checkout Flow component in Experience Builder.

Example Promotions

When you configure a promotion, you customize it based on what you would like customers to receive and how they qualify. The examples show you how to combine basic discount and qualifier options to create different outcomes. Use them as a starting point, try your own unique combinations, and incorporate more advanced settings to create the promotions that you need.

[Order-Level Promotion Examples](#)

To create different types of promotions for a customer's total order, use these discount and qualifier settings. You don't need to specify a discount target for an order-level promotion.

[Product Promotion Examples](#)

To create different types of promotions for specific products, use these discount and qualifier settings.

[Product Category Promotion Examples](#)

To create different types of promotions for products in a product category, use these discount and qualifier settings.

[Advanced Promotion Examples](#)

When you've familiarized yourself with the basics of creating a promotion, here are a few ways to customize them.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce

Order-Level Promotion Examples

To create different types of promotions for a customer's total order, use these discount and qualifier settings. You don't need to specify a discount target for an order-level promotion.

Customer Buys	Customer Receives	Discount Target	Discount Adjustment Type	Qualifier	Qualifier Rule	Example
Anything	Percent off entire transaction	—	Percentage Discount	—	—	Receive 10% off the order.
	Currency amount off entire transaction	—	Fixed Amount Off Transaction	—	—	Receive \$10 off the order.
X worth of any product	Percent off entire transaction	—	Percentage Discount	—	Minimum Amount X	Spend \$50 to receive 10% off the order
	Currency amount off entire transaction	—	Fixed Amount Off Transaction	—	Minimum Amount X	Spend \$50 to receive \$10 off the order.
X units of Product A	Percent off entire transaction	—	Percentage Discount	Product A	Minimum Quantity X	Buy 5 bags of Alpine Medium Roast coffee beans to receive 10% off the order.
	Currency amount off entire transaction	—	Fixed Amount Off Transaction	Product A	Minimum Quantity X	Buy 5 bags of Alpine Medium Roast coffee beans to receive \$10 off the order.
X worth of Product A	Percent off entire transaction	—	Percentage Discount	Product A	Minimum Amount X	Buy \$50 of Alpine Medium Roast coffee beans to receive 10%

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

Customer Buys	Customer Receives	Discount Target	Discount Adjustment Type	Qualifier	Qualifier Rule	Example
						off the order.
	Currency amount off entire transaction	—	Fixed Amount Off Transaction	Product A	Minimum Amount X	Buy \$50 of Alpine Medium Roast coffee beans to receive \$10 off the order.
X products from Category A	Percent off entire transaction	—	Percentage Discount	Category A	Minimum Quantity X	Buy 5 products from the Imports category to receive 10% off the order.
	Currency amount off entire transaction	—	Fixed Amount Off Transaction	Category A	Minimum Quantity X	Buy 5 products from the Imports category to receive \$10 off the order.
X worth of products from Category A	Percent off entire transaction	—	Percentage Discount	Category A	Minimum Amount X	Buy \$50 of products from the Imports category to receive 10% off the order.
	Currency amount off entire transaction	—	Fixed Amount Off Transaction	Category A	Minimum Amount X	Buy \$50 of products from the Imports category to receive \$10 off the order.

SEE ALSO:

[Commerce Promotions](#)

Product Promotion Examples

To create different types of promotions for specific products, use these discount and qualifier settings.

Customer Buys	Customer Receives	Discount Target	Discount Adjustment Type	Qualifier	Qualifier Rule	Example
Anything	Percent off Product A	Product A	Percentage Discount	—	—	Receive 10% off Alpine Medium Roast coffee beans.
	Fixed amount off a line item of Product A	Product A	Fixed Amount off Line Item Total	—	—	Receive \$10 off your total purchase of Alpine Medium Roast coffee beans.
	Fixed amount off each unit of Product A	Product A	Fixed Amount off Unit Price	—	—	Receive \$10 off each unit of Alpine Medium Roast coffee beans.
	Fixed price for Product A	Product A	Fixed Price	—	—	Receive a unit of Alpine Medium Roast Coffee Beans for \$10.
	Fixed price for a set of Product A	Product A	Total Fixed Price (Quantity limit required)	—	—	Receive 3 units of Alpine Medium Roast Coffee Beans for \$20.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

Customer Buys	Customer Receives	Discount Target	Discount Adjustment Type	Qualifier	Qualifier Rule	Example
X worth of any product	Percent off Product A	Product A	Percentage Discount	—	Minimum Amount X	Spend \$50 to receive 10% off Alpine Medium Roast coffee beans.
	Fixed amount off a line item of Product A	Product A	Fixed Amount off Line Item Total	—	Minimum Amount X	Spend \$50 to receive \$10 off Alpine Medium Roast coffee beans.
	Fixed amount off each unit of Product A	Product A	Fixed Amount off Unit Price	—	Minimum Amount X	Spend \$50 to receive \$10 off each unit of Alpine Medium Roast coffee beans.
	Fixed price for Product A	Product A	Fixed Price	—	Minimum Amount X	Spend \$50 to receive a unit of Alpine Medium Roast Coffee Beans for \$10.
	Fixed price for a set of Product A	Product A	Total Fixed Price (Quantity limit required)	—	Minimum Amount X	Spend \$50 to receive 3 units of Alpine Medium Roast Coffee Beans for \$20.
X units of Product A	Percent off Product A	Product A	Percentage Discount	Product A	Minimum Quantity X	Buy 5 units of Alpine Medium Roast coffee beans to receive 10% off that product.
	Fixed amount off a line item of Product A	Product A	Fixed Amount off Line Item Total	Product A	Minimum Quantity X	Buy 5 units of Alpine Medium Roast coffee beans to receive \$10 off a line item of that product.
	Fixed amount off each unit of Product A	Product A	Fixed Amount off Unit Price	Product A	Minimum Quantity X	Buy 5 units of Alpine Medium Roast coffee

Customer Buys	Customer Receives	Discount Target	Discount Adjustment Type	Qualifier	Qualifier Rule	Example
						beans to receive \$10 off each unit of that product.
	Fixed price for Product A	Product A	Fixed Price	Product A	Minimum Quantity X	Buy 5 units of Alpine Medium Roast coffee beans to receive a unit of Alpine Medium Roast Coffee Beans for \$10.
	Fixed price for a set of Product A	Product A	Total Fixed Price (Quantity limit required)	Product A	Minimum Quantity X	Buy 5 units of Alpine Medium Roast coffee beans to receive 3 units of Alpine Medium Roast Coffee Beans for \$20.
X worth of Product A	Percent off Product A	Product A	Percentage Discount	Product A	Minimum Amount X	Buy \$50 worth of Alpine Medium Roast coffee beans to receive 10% off products from the coffee machine category.
	Fixed amount off a line item of Product A	Product A	Fixed Amount off Line Item Total	Product A	Minimum Amount X	Buy \$50 worth of Alpine Medium Roast coffee beans to receive 10% off that product.
	Fixed amount off each unit of Product A	Product A	Fixed Amount off Unit Price	Product A	Minimum Amount X	Buy \$50 worth of Alpine Medium Roast coffee beans to receive \$10 off a line item of that product.
	Fixed price for Product A	Product A	Fixed Price	Product A	Minimum Amount X	Buy \$50 worth of Alpine Medium Roast coffee

Customer Buys	Customer Receives	Discount Target	Discount Adjustment Type	Qualifier	Qualifier Rule	Example
						beans to receive a unit of that product for \$10.
	Fixed price for a set of Product A	Product A	Total Fixed Price (Quantity limit required)	Product A	Minimum Amount X	Buy \$50 worth of Alpine Medium Roast coffee beans to receive 3 units of that product for \$20.
X products from Category A	Percent off Product B	Product B	Percentage Discount	Category A	Minimum Quantity X	Buy 5 products from the Imports category to receive 10% off an Alpine Professionals coffee machine.
	Fixed amount off a line item of Product B	Product B	Fixed Amount off Line Item Total	Category A	Minimum Quantity X	Buy 5 products from the Imports category to receive \$10 off your purchase of Alpine Professionals coffee machines.
	Fixed amount off each unit of Product B	Product B	Fixed Amount off Unit Price	Category A	Minimum Quantity X	Buy 5 products from the Imports category to receive \$10 off each Alpine Professionals coffee machine.
	Fixed price for Product B	Product B	Fixed Price	Category A	Minimum Quantity X	Buy 5 products from the Imports category to receive an Alpine Professionals coffee machine for \$30.
	Fixed price for a set of Product B	Product B	Total Fixed Price (Quantity limit required)	Category A	Minimum Quantity X	Buy 5 products from the Imports category to receive two

Customer Buys	Customer Receives	Discount Target	Discount Adjustment Type	Qualifier	Qualifier Rule	Example
						Alpine Professionals coffee machines for \$50.
X worth of products from Category A	Percent off Product B	Product B	Percentage Discount	Category A	Minimum Amount X	Buy \$50 worth of products from the Imports category to receive 10% off an Alpine Professionals coffee machine.
	Fixed amount off a line item of Product B	Product B	Fixed Amount off Line Item Total	Category A	Minimum Amount X	Buy \$50 worth of products from the Imports category to receive \$10 off your total purchase of Alpine Professionals coffee machines.
	Fixed amount off each unit of Product B	Product B	Fixed Amount off Unit	Category A	Minimum Amount X	Buy \$50 worth of products from the Imports category to receive \$10 off each Alpine Professionals coffee machine.
	Fixed price for Product B	Product B	Fixed Price	Category A	Minimum Amount X	Buy \$50 worth of products from the Imports category to receive an Alpine Professionals coffee machine for \$30.
	Fixed price for a set of Product B	Product B	Total Fixed Price (Quantity limit required)	Category A	Minimum Amount X	Buy \$50 worth of products from the Imports category to receive two

Customer Buys	Customer Receives	Discount Target	Discount Adjustment Type	Qualifier	Qualifier Rule	Example
						Alpine Professionals coffee machines for \$50.

SEE ALSO:

[Commerce Promotions](#)

Product Category Promotion Examples

To create different types of promotions for products in a product category, use these discount and qualifier settings.

Customer Buys	Customer Receives	Discount Target	Discount Adjustment Type	Qualifier	Qualifier Rule	Example
Anything	Percent off products from Category A	Category A	Percentage Discount	—	—	Receive 10% off any product from the Imports category.
	Fixed amount off a line item of products from Category A	Category A	Fixed Amount off Line Item Total	—	—	Receive a \$10 discount on a line item of products from the Imports category.
	Fixed amount off a product unit from Category A	Category A	Fixed Amount off Unit Price	—	—	Receive a \$10 discount on a product unit from the Imports category.
	Fixed price for any product from Category A	Category A	Fixed Price	—	—	Receive a product from the Imports

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

Customer Buys	Customer Receives	Discount Target	Discount Adjustment Type	Qualifier	Qualifier Rule	Example
						category for \$25.
	Fixed price for a set of products from Category A	Category A	Total Fixed Price (Quantity limit required)	—	—	Receive two products from the Imports category for \$50.
X worth of any product	Percent off products from Category A	Category A	Percentage Discount	—	Minimum Amount X	Spend \$50 to receive 10% off products from the Imports category.
	Fixed amount off a line item of products from Category A	Category A	Fixed Amount off Line Item Total	—	Minimum Amount X	Spend \$50 to receive \$10 off a line item of products from the Imports category.
	Fixed amount off a product unit from Category A	Category A	Fixed Amount off Unit Price	—	Minimum Amount X	Spend \$50 to receive \$5 off a product unit from the Imports category.
	Fixed price for any product from Category A	Category A	Fixed Price	—	Minimum Amount X	Spend \$50 to receive a product from the Imports category for \$10.
	Fixed price for a set of products from Category A	Category A	Total Fixed Price (Quantity limit required)	—	Minimum Amount X	Spend \$50 to receive 3 products from the Imports category for \$20.
X units of Product A	Percent off products from Category B	Category B	Percentage Discount	Product A	Minimum Quantity X	Buy 5 units of Alpine Medium Roast coffee beans to receive 10% off products from the Coffee Machine category.
	Fixed amount off a line item of	Category B	Fixed Amount off Line Item Total	Product A	Minimum Quantity X	Buy 5 units of Alpine Medium

Customer Buys	Customer Receives	Discount Target	Discount Adjustment Type	Qualifier	Qualifier Rule	Example
	products from Category B					Roast coffee beans to receive \$20 off a line item of products from the Coffee Machine category.
	Fixed amount off a product unit from Category B	Category B	Fixed Amount off Unit Price	Product A	Minimum Quantity X	Buy 5 units of Alpine Medium Roast coffee beans to receive \$10 off a product unit from the Coffee Machine category.
	Fixed price for any product from Category B	Category B	Fixed Price	Product A	Minimum Quantity X	Buy 5 units of Alpine Medium Roast coffee beans to receive a product from the Coffee Machine category for \$50.
	Fixed price for a set of products from Category B	Category B	Total Fixed Price (Quantity limit required)	Product A	Minimum Quantity X	Buy 5 units of Alpine Medium Roast coffee beans to receive 2 products from the coffee machine category for \$100.
X worth of Product A	Percent off products from Category B	Category B	Percentage Discount	Product A	Minimum Amount X	Buy \$50 worth of Alpine Medium Roast coffee beans to receive 10% off products from the coffee machine category.
	Fixed amount off a line item of	Category B	Fixed Amount off Line Item Total	Product A	Minimum Amount X	Buy \$50 worth of Alpine Medium

Customer Buys	Customer Receives	Discount Target	Discount Adjustment Type	Qualifier	Qualifier Rule	Example
	products from Category B					Roast coffee beans to receive \$20 off a line item of products from the coffee machine category.
	Fixed amount off a product unit from Category B	Category B	Fixed Amount off Unit Price	Product A	Minimum Amount X	Buy \$50 worth of Alpine Medium Roast coffee beans to receive \$10 off a product unit from the coffee machine category.
	Fixed price for any product from Category B	Category B	Fixed Price	Product A	Minimum Amount X	Buy \$50 worth of Alpine Medium Roast coffee beans to receive a product from the coffee machine category for \$50.
	Fixed price for a set of products from Category B	Category B	Total Fixed Price (Quantity limit required)	Product A	Minimum Amount X	Buy \$50 worth of Alpine Medium Roast coffee beans to receive 2 products from the coffee machine category for \$100.
X products from Category A	Percent off products from Category A	Category A	Percentage Discount	Category A	Minimum Quantity X	Buy 5 products from the Imports category to receive 10% off products from the Imports category.
	Fixed amount off a line item of products from Category A	Category A	Fixed Amount off Line Item Total	Category A	Minimum Quantity X	Buy 5 products from the Imports category to receive \$10 off a

Customer Buys	Customer Receives	Discount Target	Discount Adjustment Type	Qualifier	Qualifier Rule	Example
						line item of products from the Imports category.
	Fixed amount off a product unit from Category A	Category A	Fixed Amount off Unit Price	Category A	Minimum Quantity X	Buy 5 products from the Imports category to receive \$10 off a product unit from the Imports category.
	Fixed price for any product from Category A	Category A	Fixed Price	Category A	Minimum Quantity X	Buy 5 products from the Imports category to receive a product from the Imports category for \$10.
	Fixed price for a set of products from Category A	Category A	Total Fixed Price (Quantity limit required)	Category A	Minimum Quantity X	Buy 5 products from the Imports category to receive two products from the Imports category for \$20.
X worth of products from Category A	Percent off products from Category A	Category A	Percentage Discount	Category A	Minimum Amount X	Buy \$50 worth of products from the Imports category to receive 10% off products from the Imports category.
	Fixed amount off a line item of products from Category A	Category A	Fixed Amount off Line Item Total	Category A	Minimum Amount X	Buy \$50 worth of products from the Imports category to receive \$10 off a line item of products from the Imports category.

Customer Buys	Customer Receives	Discount Target	Discount Adjustment Type	Qualifier	Qualifier Rule	Example
	Fixed amount off a product unit from Category A	Category A	Fixed Amount off Unit	Category A	Minimum Amount X	Buy \$50 worth of products from the Imports category to receive \$10 off a product unit from the Imports category.
	Fixed price for any product from Category A	Category A	Fixed Price	Category A	Minimum Amount X	Buy \$50 worth of products from the Imports category to receive a product from the Imports category for \$10.
	Fixed price for a set of products from Category A	Category A	Total Fixed Price (Quantity limit required)	Category A	Minimum Amount X	Buy \$50 worth of products from the Imports category to receive two products from the Imports category for \$20.

SEE ALSO:

[Commerce Promotions](#)

Advanced Promotion Examples

When you've familiarized yourself with the basics of creating a promotion, here are a few ways to customize them.

Add More Discount Targets

A promotion can target a single category or include multiple product discounts. For example, "Spend \$50, get \$10 off product X or \$10 off product Y" or "Spend \$50, get \$10 off category Z."

To target multiple categories for a discount, set up multiple promotions, one for each category. For example, in this promotion, "Spend \$150, get \$10 off category Z and D", set up separate promotions in the Z and D categories.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

Add More Qualifiers

Multiple qualifiers can make a promotion more flexible or more restrictive, depending on your qualifier criteria. If a customer must meet only one qualifier, select **Any**. To require that a customer meets every qualifier to receive the promotion, select **All**.

Apply Quantity or Cart Limits

To restrict the number of times a product can receive a promotion, in the discount settings, enter the quantity limit. To restrict the number of times a promotion can apply to a cart, in the promotion details, enter a maximum application per cart. To create more sophisticated promotions, combine these limits. To require that a customer meets the quantity limit before receiving the discount, select **Apply discount only when a cart reaches the quantity limit**.

Create a Basic BOGO Promotion Deal

To offer a buy-one-get-one (BOGO) deal, use the same product or product category as your discount and qualifier. Because the customer must buy a product at full price to receive the discount on an additional product, in the promotion details, select **Exclude qualifying items from discounts**.



Example: You want to require that a customer buys an item from the Baseball Cap category or an item from the T-shirt category to receive one free pair of athletic socks. The offer can be redeemed only one time per order. To configure this scenario:

- Add a qualifier for both categories.
- In the discount details, enter a quantity limit of *1*.
- In the promotion details, set the qualifier criteria to **Any**.
- In the promotion details, enter a Maximum Applications Per Cart value of *1*.



Example: You want to create a modified BOGO deal that offers customers 50% off two bags of Alpine Medium Roast Coffee for every five bags of that same coffee that they purchase. The customer must buy two additional bags, for a total of seven bags, to receive the discount. To configure this scenario:

- Add a qualifier for Alpine Medium Roast Coffee, and enter a minimum quantity of *5*.
- Add a discount for Alpine Medium Roast Coffee.
- In the discount details, enter a quantity limit of *2*, and select **Apply discount only when a cart reaches the quantity limit**.
- In the promotion details, select **Exclude qualifying items from discount**.

Create Advanced BOGO Promotion Deals

Sometimes merchants or manufacturers require that a discounted item can't cost more than the least-expensive qualifying item.




Example: You want to create a modified BOGO deal that offers customers 50% off a pair of pants when they purchase a shirt. However, the pants must cost less than the shirt.

- Create your promotion, and set the discount restriction to **Limit by Least Expensive Qualifying Product**.
- Add a promotion qualifier.
 - Qualifier: Category > Shirt
 - Qualifier Type: Product category
 - Minimum Quantity: *1*
- Add a discount target.
 - Target: Category > Pants


- Target Type: Product category
- Adjustment Type: Percentage Discount
- Adjustment Percent: 50
- Quantity Limit: 1

By default, the most expensive items are discounted first, followed by the less expensive items. You can reverse this strategy and discount the least-expensive items first.

 **Example:** You want to create a modified BOGO deal that offers customers a free pair of pants when they buy a shirt. If they have two pairs of pants in the cart, the least-expensive pants are free.

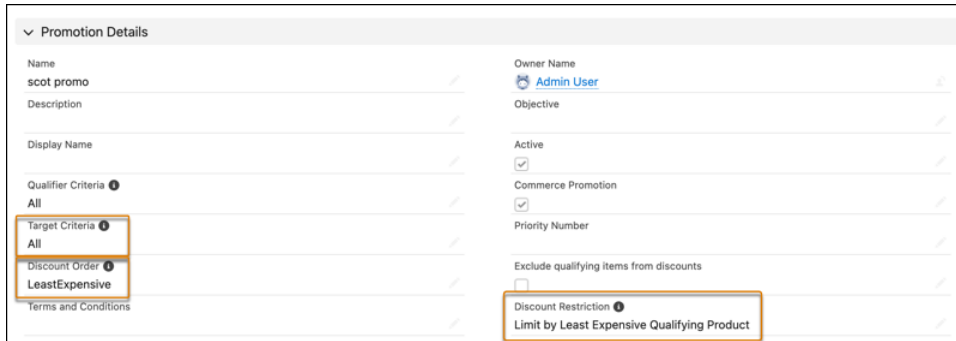
- Create your promotion, and set the discount order to **Least Expensive**.
- Add a promotion qualifier.
 - Qualifier: Category > Shirt
 - Qualifier Type: Product category
 - Minimum Quantity: 1
- Add a discount target.
 - Target: Category > Pants
 - Target Type: Product category
 - Adjustment Type: Percentage Discount
 - Adjustment Percent: 100
 - Quantity Limit: 1

You can create a multiple-discount promotion that requires all discount types to be met before the promotion is applied.

 **Example:** You want to create a modified BOGO deal that gives the customer two discounts. If they buy a shirt, they can get a pair of pants at 50% off and \$10 off a pair of shoes. All three items must be in the cart before the promotion applies.

- Create your promotion, and set the target criteria to **All**.
- Add a promotion qualifier.
 - Qualifier: Category > Shirt
 - Qualifier Type: Product category
 - Minimum Quantity: 1
- Add a discount target.
 - Target: Product > Pants
 - Target Type: Product
 - Adjustment Type: Percentage Discount
 - Adjustment Percent: 50
 - Quantity Limit: 1
- Add another discount target.
 - Target: Product > Shoes
 - Target Type: Product
 - Adjustment Type: Fixed Amount Off Unit Price

- Adjustment Percent: 10
- Quantity Limit: 1



SEE ALSO:

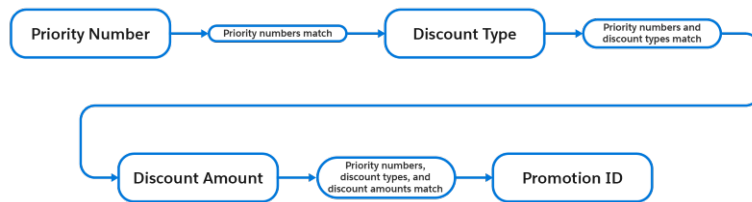
[Commerce Promotions](#)

Prioritizing Promotions

When a cart is eligible for multiple promotions, your exclusivity and priority rules determine which promotions apply.

Promotion priority is first determined by exclusivity, which specifies whether a promotion can be combined with other promotions. Next, the promotion’s priority is based on its priority number, discount type, discount amount, and promotion ID.

If priority numbers match, the store considers each promotion’s discount details.



Exclusivity

You specify the exclusivity type when you create your promotion. A non-exclusive promotion can be combined with other promotions. A promotion with class exclusivity can’t be combined with promotions of the same class. For example, you want one product promotion per product or one transaction promotion per order. A promotion with global exclusivity is the only promotion that can be applied to an entire order.

Exclusivity type is prioritized in this order.

1. Global exclusive product
2. Global exclusive order
3. Class exclusive product
4. Non-exclusive product
5. Class exclusive order

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

6. Non-exclusive order

Within each exclusivity type, promotions are prioritized in this order.

1. Priority number
2. Discount type
3. Discount amount
4. Alphabetically by ID

Priority Number

A priority number is the best way to control how your store applies a promotion. You set the priority number when you create your promotion. The lower the number, the higher the priority.

Product and product category promotions are evaluated and applied first. Cart and order promotions are evaluated and applied after all product and product category promotions, even if they have a higher priority.

Discount Type

When promotions have the same priority number, your store considers the discount type. Certain types of discounts are prioritized over others. Discounts are prioritized in this order.

1. Fixed price
2. Total fixed price
3. Fixed amount off
4. Percentage off

If a promotion has multiple discount targets, the highest priority discount type is used.

Discount Amount

When promotions have the same priority number and discount type, your store prioritizes the discount that results in the highest savings for your customer. Discounts amounts are prioritized in this order.

1. Fixed price—Prioritizes the promotion with the lowest fixed price.
2. Total fixed price—Prioritizes the promotion with the lowest fixed price.
3. Fixed amount off—Prioritizes the promotion with the highest amount off.
4. Percentage off—Prioritizes the promotion with the highest percentage off.

If a promotion has multiple discount targets, the amount of the highest priority discount type is used.

Promotion ID

When promotions have the same priority number, discount type, and discount amount, your store prioritizes the promotion by its numerical ID. The lower the numerical ID, the higher the priority.

 **Example:** A customer spends \$125 on a pair of shoes and is eligible for two priority 1, product-level promotions.

- Promotion A deducts 10% off the price of the pair of shoes.
- Promotion B offers the shoes for a fixed price of \$100.

The promotions have the same priority level, so the store considers the discount type. The customer receives Promotion B because a fixed price discount is prioritized over a percentage discount.

Remove a Promotion

You can remove a promotion from your store temporarily or permanently.

1. From the Commerce app navigation menu, select **Promotion Workspace**.
2. Select the promotion.
3. To remove the promotion temporarily:
 - a. Click **Edit**.
 - b. To deactivate the promotion, deselect **Active**.
 - c. To end the promotion sooner, change the end date and time.
 - d. Save your work.
4. To remove the promotion permanently:
 - a. Click **Delete**.
 - b. In the confirmation window, click **Delete** to confirm.

 **Note:** If a promotion is connected to an order, you can't delete it. To stop the promotion from being applied to new transactions, update its end time or deactivate it.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

SEE ALSO:

[Commerce Promotions](#)

Sell Globally

Enable languages, translations, and currencies to expand the reach of your store to countries around the world.

[Configure Salesforce for Global Stores](#)

Make sure that your language, translation, and currency settings support stores around the world.

[Configure Store Language, Currency, and Tax](#)

Make sure that the language, currency, and tax settings are configured correctly to sell around the world.

[Configure the Salesforce Tax Solution](#)

You can optionally set up taxes for your store using the Salesforce tax solution instead of a third-party tax calculation service.

[Segment a Store into Markets Based on Locale](#)

Instead of standing up multiple stores for different regions, use one store and segment your customers into markets based on locale. When customers visit the store, they can choose their locale. Based on their selection, the store displays prices, promotions, and entitlements specific to their market. You can have a total of up to 25 active locales for a store across all markets. For example, your store could have one market with 25 locales or 25 markets with one locale each. A locale can be used only one time across all markets assigned to a store.

[Manage Translations](#)

You can translate the product, category, and promotion text. If you're using product variations, you can also translate the variation attribute names. In Experience Builder, you can localize the store component labels.

Configure Salesforce for Global Stores

Make sure that your language, translation, and currency settings support stores around the world.

[Add Language Support to the Store Page Layout](#)

To manage products in more than one language, add a supported language field to the store page layout.

[Enable Data Translation](#)

When you enable data translation, you can translate the data stored in the product and category fields. You can also enable data translation for custom text and URL fields on the product and category objects.

[Enable Translation Workbench](#)

To assist with localizing store information, enable Translation Workbench and add the languages that you want to use in your stores.

[Enable Currencies](#)

To create stores that use a currency other than the currency listed as the Currency Locale on your org's Company Information page, you must enable those currencies. Currency changes that you make apply to all stores in your org.

Add Language Support to the Store Page Layout

To manage products in more than one language, add a supported language field to the store page layout.

1. From Setup, go to Object Manager.
2. In the Quick Find box, enter `store`, and select **Store > Page Layouts > Store Layout**.
3. From the Fields menu, drag the **Supported Language** and **Default Language** fields on to the Store page layout.
4. Save your changes.

SEE ALSO:

[Page Layouts](#)

[Configure Salesforce for Global Stores](#)

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available In: B2B Commerce and D2C Commerce

Enable Data Translation

When you enable data translation, you can translate the data stored in the product and category fields. You can also enable data translation for custom text and URL fields on the product and category objects.

 **Note:** Data translation requires API version 48.0 or later. Data translation counts against your org's storage limits.

1. Enable data translation for the name and description fields on the product and category objects.
 - a. From Setup, in the Quick Find box, enter *Company Information*, and select **Company Information**.
 - b. In the Organization Detail section, click **Edit**.
 - c. Select **Enable Data Translation**.
 - d. Save your changes.
2. Enable data translation for custom fields.
 - a. From Setup, in the Quick Find box, enter *Data Translation Settings*, and select **Data Translation Settings**.
 - b. Select the object. Only the objects that support data translation are listed.
 - c. Select the custom fields that you want to make available for data translation.
You can enable data translation only for custom fields with a type of Text, Text Area, Text Area (Long), Text Area (Rich), or URL.
 - d. Save your changes.

SEE ALSO:

- [Manage Objects' Data Translations](#)
- [Configure Salesforce for Global Stores](#)
- [Localize Product, Category, and Promotion Data](#)

Enable Translation Workbench

To assist with localizing store information, enable Translation Workbench and add the languages that you want to use in your stores.

1. From Setup, in the Quick Find box, enter *Translation Workbench*, and then select **Translation Language Settings**.
2. Click **Enable**.
3. Click **Add**.
4. From the Language dropdown, select the language and select **Active**.
5. Save your changes.
Add as many languages as you need for your stores.

SEE ALSO:

- [Configure Salesforce for Global Stores](#)
- [Translation Workbench](#)

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available In: B2B Commerce and D2C Commerce

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

Enable Currencies

To create stores that use a currency other than the currency listed as the Currency Locale on your org's Company Information page, you must enable those currencies. Currency changes that you make apply to all stores in your org.

1. From Setup, in the Quick Find box, enter and then select **Company Information**.
2. Click **Edit**.
3. Under Currency Settings, select **Activate Multiple Currencies**.
4. Save your changes.
5. From Setup, in the Quick Find box, enter and then select **Manage Currencies**.
6. For the best price book experience, deselect **Parenthetical Currency Conversion**.
7. In the Active Currencies section, click **New**.
8. Set the currency type and conversion rate.
B2B and B2C stores use a currency conversion service rather than the conversion rate field. However, you must enter something in this field.
9. Set the number of decimal places.
B2B and B2C stores support three or more decimal places in the price of a product, but round to two decimal places in the line item, cart, and order totals. For example, you price a product at \$15.759. If a customer adds five items to the cart, the total is \$78.795, but the amount that is shown in the cart and order details is \$78.80.
10. Save your changes.

SEE ALSO:

[Configure Salesforce for Global Stores](#)

[Manage Multiple Currencies](#)

[Configure Language, Ship-To Countries, and Currencies for a B2B Store](#)

[Configure Language, Ship-To Countries, and Currencies for a B2C Store](#)

Configure Store Language, Currency, and Tax

Make sure that the language, currency, and tax settings are configured correctly to sell around the world.

[Configure Language, Ship-To Countries, and Currencies for a B2C Store](#)

Specify the language, ship-to countries, and currency settings for a B2C store.

[Configure Language, Ship-To Countries, and Currencies for a B2B Store](#)

Specify the language, country, ship-to countries, and currencies for a B2B store.

[Configure Tax Settings for a Store](#)

Configure tax settings for a B2B or B2C store.

[Languages Supported for Search Results](#)

For B2C stores, search results are returned in the language of the store. For B2B stores, search results are returned in the language assigned to the buyer's user account. If a buyer is configured to use a language that the store doesn't support, search results, including facet and filter values, are returned in the store's default language.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

Configure Language, Ship-To Countries, and Currencies for a B2C Store

Specify the language, ship-to countries, and currency settings for a B2C store.

These steps assume that you've already created a B2C store using the B2C store template. See [Create a Store or Reorder Portal](#).

1. From your store's home page, click the **Administration** tile.
2. Click **General Settings**.
3. Under Localization, click the pencil icon next to Supported Languages. Move the language for your store from Available to Chosen, and select the store's default language from the dropdown.
The available languages are the languages enabled in Translation Workbench. See [Enable Translation Workbench](#). B2C stores can support up to 25 languages.
4. Under Supported Ship To Countries, move the countries that you want to support to Chosen.
If you don't see the Supported Ship To Countries list, check whether your Salesforce admin has added the field to the layout.
5. Under Default Ship To Country, click the dropdown and select a supported country.
If you don't see the Default Ship To Country dropdown, check whether your Salesforce admin has added the field to the layout.
6. Under Pricing Supported Currencies, move the currencies your store supports from Available to Chosen, and select the store's default currency.
The available currencies are the currencies enabled in your org. See [Enable Currencies](#).
7. Save your changes.
8. From the store's home page, click the **Experience Builder** tile.
9. Click the gear icon, and click **Languages**.
10. If the language that you want to use isn't listed as a Site Language, click **Add Languages** and add it.
11. From the Default Site Language dropdown, select the default language for the store.
The default language that you select in Experience Builder must be the same as the language that you selected on the Administration tile for the store.
12. Add the Language Selector component to the footer of your store.
The Language Selector component allows shoppers to select their preferred language. For more information about the Language Selector component, see [Language Selector](#).

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: D2C Commerce

SEE ALSO:

[Configure Language, Ship-To Countries, and Currencies for a B2B Store](#)

Configure Language, Ship-To Countries, and Currencies for a B2B Store

Specify the language, country, ship-to countries, and currencies for a B2B store.

These steps assume that you've already created a B2B store using the B2B store template. See [Create a Store or Reorder Portal](#).

Important: To validate addresses in checkout, your store must support at least one ship-to country. If you don't select a ship-to country, address validation fails.

1. From your store's home page, click the **Administration** tile.
2. Click **General Settings**.
3. Under Localization, click the pencil icon next to Supported Languages. Move the languages for your store from Available to Chosen, and select the store's default language from the dropdown.

- The available languages are the languages enabled in Translation Workbench. B2B stores can support up to 25 languages.
- Buyers see the store in the language configured in their user record. If a buyer is configured to use a language that's not supported in the store, they see the store in the store's default language. If a buyer changes their own language in the customizable user settings component to a language not supported in the store, they see the store in the store's default language. To create a store that allows buyers to select a language for the store, use the markets feature. See [Segment a Store into Markets Based on Locale](#).

4. (Optional) Under Supported Ship To Countries, move the countries that you want to support to Chosen.

If you don't see the Supported Ship To Countries list, check whether your Salesforce admin has added the field to the layout.

Note: The Ship-to Country setting doesn't generate a country picklist that displays on your store. To display a country picklist requires writing customized code.

5. (Optional) Under Default Ship To Country, click the dropdown and select a supported country.

If you don't see the Default Ship To Country dropdown, check whether your Salesforce admin has added the field to the layout.

6. Under Pricing, click the pencil icon next to Supported Currencies. Move the currencies for your store from Available to Chosen, and select the store's default currency.

The available currencies are the currencies enabled in your org. See [Enable Currencies](#). The currency displayed to the buyer is the currency configured for the buyer's account. If the currency for the buyer's account isn't supported in the store, the store's default currency is shown. If the price books or promotions that a buyer has access to don't use the currency configured in the buyer's account, products are shown without prices, and promotions aren't activated.

Important: Buyers don't select a currency during shopping. A B2B buyer's currency is assigned when their buyer account is created.

7. Save your changes.
8. From the store's home page, click the **Experience Builder** tile.
9. Click the gear icon, and click **Languages**.
10. If the languages that you want to use aren't listed under Site Language, click **Add Languages** and add them.
11. From the Default Site Language dropdown, select the default language for the store.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce

The default language that you select in Experience Builder must be the same as the default language that you selected on the Administration tile for the store.

SEE ALSO:

[Configure Tax Settings for a Store](#)


Configure Tax Settings for a Store

Configure tax settings for a B2B or B2C store.

These steps assume that you've already created a store using the store template. See [Create a Store or Reorder Portal](#).

1. From the store's home page, click the **Administration** tile.
2. Click **Tax Calculation**.
3. Under Tax Type, select Net or Gross.

For net, the product price doesn't include the tax. For gross, the product price includes the tax.

 **Important:** Be careful about selecting the tax type. After you activate the store, you can't change the tax type. If you must change the tax type after you activate the store, contact Salesforce customer support.

4. Save your changes.

If your store is using gross taxes, you can use the Salesforce tax solution. See [Configure the Salesforce Tax Solution](#). If your store is using net taxes, or you want to use a third-party tax solution, see [Add a Tax Calculation Service](#).

Languages Supported for Search Results

For B2C stores, search results are returned in the language of the store. For B2B stores, search results are returned in the language assigned to the buyer's user account. If a buyer is configured to use a language that the store doesn't support, search results, including facet and filter values, are returned in the store's default language.

Search results are supported in most languages and locales.

Language	Locales
Arabic	ar_AE, ar_BH, ar_DZ, ar_EG, ar_IQ, ar_JO, ar_KW, ar_LB, ar_LY, ar_MA, ar_OM, ar_QA, ar_SA, ar_SD, ar_SY, ar_TN, ar_YE
Armenia	hy_AM
Bangla	bn_BD, bn_IN
Basque	eu_ES
Bulgarian	bg_BG
Catalan	ca_ES, ca_ES_EURO
Chinese	zh_CN, zh_CN_PINYIN, zh_CN_STROKE, zh_HK, zh_HK_STROKE, zh_MO, zh_SG, zh_TW, zh_TW_STROKE

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available In: B2B Commerce and D2C Commerce

Language	Locales
Czech	cs_CZ
Danish	da_DK
Dutch	nl_AW, nl_BE, nl_NL, nl_SR
English	en_AG, en_AU, en_BS, en_BB, en_BZ, en_BM, en_BW, en_CM, en_CA, en_KY, en_ER, en_FK, en_FJ, en_GM, en_GH, en_GI, en_GY, en_HK, en_IN, en_ID, en_IE, en_IE_EURO, en_JM, en_KE, en_LR, en_MG, en_MW, en_MY, en_MU, en_NA, en_NZ, en_NG, en_PK, en_PG, en_PH, en_RW, en_WS, en_SC, en_SL, en_SG, en_SX, en_SB, en_ZA, en_SH, en_SZ, en_TZ, en_TO, en_TT, en_UG, en_GB, en_US, en_VU
Finnish	fi_FI, fi_FI_EURO
French	fr_BE, fr_CA, fr_CH, fr_FR_EURO, fr_FR, fr_GN, fr_HT, fr_KM, fr_LU, fr_MC, fr_MR, fr_WF
German	de_AT, de_AT_EURO, de_BE, de_DE, de_DE_EURO, de_LU, de_LU_EURO, de_CH
Greek	el_GR
Hindi	hi_IN
Hungarian	hu_HU
Indonesian	in_ID
Irish	ga_IE
Italian	it_CH, it_IT
Japanese	ja_JP
Latvian	lv_LV
Lithuanian	lt_LT
Norwegian	no_NO
Persian	fa_IR
Portuguese	pt_AO, pt_BR, pt_CV, pt_MZ, pt_PT, pt_ST
Romanian	ro_MD, ro_RO
Russian	ru_KZ, ru_RU
Spanish	es_AR, es_BO, es_CL, es_CO, es_CR, es_CU, es_DO, es_EC, es_SV, es_GT, es_HN, es_MX, es_NI, es_PA, es_PY, es_PE, es_PR, es_ES, es_ES_EURO, es_US, es_UY, es_VE
Swedish	sv_SE
Thai	th_TH

Language	Locales
Turkish	tr_TR

SEE ALSO:

[Enable Data Translation](#)

[Localize Product, Category, and Promotion Data](#)

[Store Search](#)

Configure the Salesforce Tax Solution

You can optionally set up taxes for your store using the Salesforce tax solution instead of a third-party tax calculation service.

[What Is the Salesforce Tax Solution?](#)

The Salesforce tax solution is a built-in service that calculates taxes for stores that use gross taxation—taxes are included in the product price. The Salesforce tax solution supports tax percent calculations at the country, state, and province level. We recommend that you consult with a tax expert when setting up taxes for your store.

[Show Salesforce Tax Solution Tabs](#)

If you're using a Salesforce org provisioned with Commerce Cloud before the Winter '23 release, make the tax-related entities visible.

[Create Geo Countries](#)

You assign a geo country to a tax rate to specify which country the tax rate applies to. Create a geo country for every country where you want to specify a tax rate. The geo country is the country to which a product is shipped, not from where the order was placed.

[Create Geo States](#)

You assign a geo state to a tax rate to specify which state or province the tax rate applies to. Create a geo state for each state and province that you want to specify a tax rate for. The geo state is the state or province to which a product is shipped, not from where the order was placed.

[Select Salesforce Tax Solution and Assign a Tax Policy to a Store](#)

When you use the Salesforce tax solution, you must assign a tax policy to the store.

[Configure Tax Rates and Treatments](#)

A tax rate specifies the percentage at which a product is taxed and the country, state, or province where that rate applies. A tax treatment maps the tax rate to products. A tax policy includes all the tax treatments for your store's products.

[Set the Default Tax Treatment for a Store](#)

If a customer purchases a product in your store that isn't included in a tax treatment, the product is taxed at the rate specified by the store's default tax treatment.

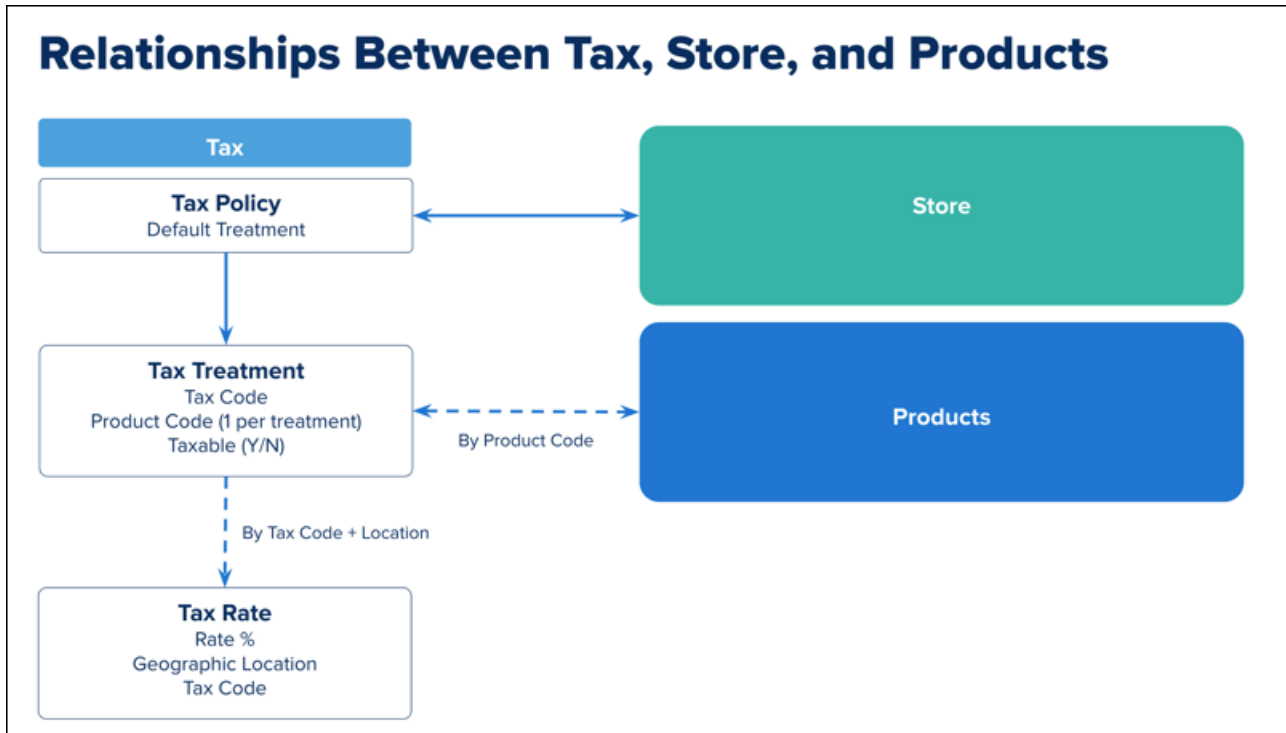
[Taxing Items with Promotion Adjustments](#)

Items that are part of a promotion or tier adjustment are taxed after the promotion amount is subtracted from the product price. The tax is calculated on the adjusted amount.

What Is the Salesforce Tax Solution?

The Salesforce tax solution is a built-in service that calculates taxes for stores that use gross taxation—taxes are included in the product price. The Salesforce tax solution supports tax percent calculations at the country, state, and province level. We recommend that you consult with a tax expert when setting up taxes for your store.

A tax rate specifies the percentage at which a product is taxed and the country, state, and province where that rate applies. A tax treatment maps the tax rate to products. A tax policy collects all the tax treatments for a specific store.



For example, you want all adult clothing sold in the United Kingdom (UK) taxed at the full 20% VAT rate. Because children's clothing is exempt from VAT in the UK, you want to tax children's clothing at 0%.

1. Assign all adult clothing the product code *Adult-Clothing*.
2. Assign all children's clothing the product code *Child-Clothing*.
3. Configure a tax rate with country UK, a 20% rate, and a tax code such as *VAT*.
4. Configure a tax rate with country UK, a 0% rate, and a tax code such as *No_Tax*.
5. Create a tax treatment that maps the product code *Adult-Clothing* to the 20% tax rate using the tax code *VAT*.
6. Create another tax treatment that maps the product code *Child-Clothing* to the 0% tax rate using the tax code *No_Tax*.
7. Assign both tax treatments to the tax policy for the store.

When an adult clothing product is shipped to the UK, the 20% tax rate is applied. When a child clothing product is shipped to the UK, the 0% tax rate is applied.

You can configure a default tax treatment for a store. Use the default tax treatment to simplify configuration. For example, you want all products in a country to be taxed at the same rate.

1. Assign the same product code to all products, for example, *ALL*.
2. Create a tax rate for each country. Assign all tax rates the same tax code, for example, *ALL_Tax*, and whatever rate you want to use for the country.
3. Create a tax treatment that uses the same tax code that all the tax rates are assigned.
4. Assign the tax treatment as the default tax policy for the store.

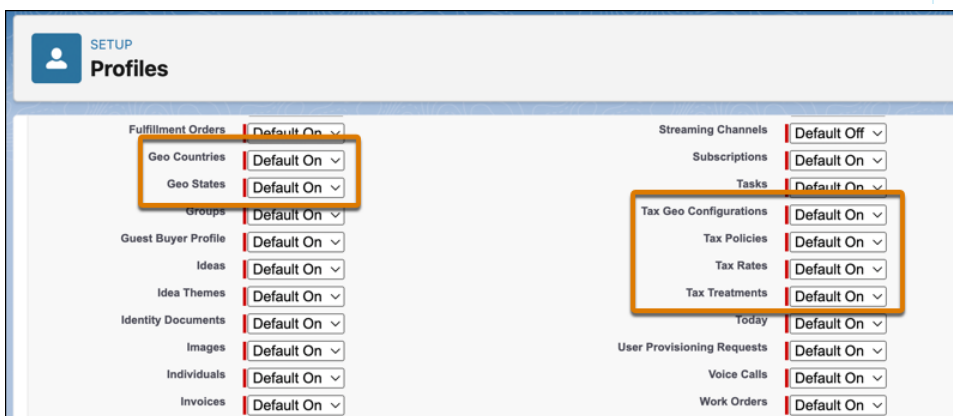
The default tax treatment is applied to all products, with the tax rate determined by the ship-to country.

Show Salesforce Tax Solution Tabs

If you're using a Salesforce org provisioned with Commerce Cloud before the Winter '23 release, make the tax-related entities visible.

A user with Salesforce admin privileges completes these steps.

1. From Setup, in the Quick Find box, enter *Users*, and then select **Profiles**.
2. For the user profiles that configure taxes, click **Edit**.
3. Under Tab Settings, from the dropdown menu for Geo Countries, Geo States, Tax Geo Configurations, Tax Policies, Tax Rates, and Tax Treatments, select **Default On**.



4. Save your changes.

SEE ALSO:

- [Select Salesforce Tax Solution and Assign a Tax Policy to a Store](#)
- [Configure Tax Rates and Treatments](#)
- [Set the Default Tax Treatment for a Store](#)
- [What Is the Salesforce Tax Solution?](#)

Create Geo Countries

You assign a geo country to a tax rate to specify which country the tax rate applies to. Create a geo country for every country where you want to specify a tax rate. The geo country is the country to which a product is shipped, not from where the order was placed.

Before adding a geo state, configure the states, countries, and territories in Setup.

1. From the App Launcher, search for and select **Geo Countries**.
2. Click **New**.
3. Enter the two-letter ISO code for the country. For example, enter FR for France.
For a list of ISO codes, see [Standard Countries and Territories for Address Picklists](#).
4. (Optional) Enter a description, and click **Save**.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

EDITIONS

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Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

Create Geo States

You assign a geo state to a tax rate to specify which state or province the tax rate applies to. Create a geo state for each state and province that you want to specify a tax rate for. The geo state is the state or province to which a product is shipped, not from where the order was placed.

Before adding a geo state or geo country, configure the states, countries, and territories in Setup.

1. From the App Launcher, search for and select **Geo States**.
2. Click **New**.
3. Enter the two-character ISO code for the state or province. For example, enter CA for California.
4. Select the geo country that the state or province is in.
5. Enter a description, and click **Save**.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Select Salesforce Tax Solution and Assign a Tax Policy to a Store

When you use the Salesforce tax solution, you must assign a tax policy to the store.

1. On the store's home page, click the **Administration** tile.
2. Click **Tax Calculation**.
3. Under Integration, click **Link Integration**.
4. Select **Standard Tax, Salesforce Service**, and click **Next**.
5. Click **Confirm**.
6. From the Tax Policy dropdown, select the tax policy for the store.
When you select the Salesforce tax service, it creates a tax policy for the store. You can use this policy or one that you created.
7. Click **Save**.

Configure tax rates and tax treatments and assign them to the store's tax policy.

SEE ALSO:

- [Configure Tax Rates and Treatments](#)
- [Set the Default Tax Treatment for a Store](#)
- [What Is the Salesforce Tax Solution?](#)

Configure Tax Rates and Treatments

A tax rate specifies the percentage at which a product is taxed and the country, state, or province where that rate applies. A tax treatment maps the tax rate to products. A tax policy includes all the tax treatments for your store's products.

1. From the App Launcher, search for and select **Tax Rates**.
2. Click **New**.
3. Configure the tax rate fields and save your changes.
 - a. Enter a tax code.
You use the tax code to map products to the tax rate. You can use a tax code supplied by a country, state, or province or create your own.
 - b. Enter the geo country or geo state where the rate applies.
The geo country and geo state is where the item is shipped. See [Create Geo Countries](#) and [Create Geo States](#).
 - c. Enter a percentage for the rate.
 - d. Enter a priority.
The priority number determines which tax rate applies first. The lower the number, the higher the priority. If a tax code has both a country and state tax rate associated with it, the priority determines the order in which the tax is calculated. If two tax rates have the same priority, they're added together and applied to the product price. If you don't enter a priority number, the tax rate is evaluated last.

4. From the App Launcher, select **Tax Treatment**.

EDITIONS

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Available in: B2B Commerce and D2C Commerce

5. Click **New**.
6. Configure the tax treatment fields and save your changes.
 - a. Enter a name for the tax treatment and an optional description.
 - b. Set the status to **Active**.
 - c. Enter the treatment's product code.
 - d. If you have Revenue Cloud Subscription Management and Commerce permissions enabled, select **Yes** for taxable.
If you have only Commerce permissions, you don't see this field.
 - e. Enter the tax code for the tax rates for this treatment.
 - f. Set the tax policy to the policy assigned to your store.

Repeat these steps to create tax rates and treatments for all products included in the store's tax policy. Assign a default tax treatment to the store.

SEE ALSO:

- [Select Salesforce Tax Solution and Assign a Tax Policy to a Store](#)
- [Set the Default Tax Treatment for a Store](#)
- [What Is the Salesforce Tax Solution?](#)

Set the Default Tax Treatment for a Store

If a customer purchases a product in your store that isn't included in a tax treatment, the product is taxed at the rate specified by the store's default tax treatment.

1. Navigate to the store's tax policy.
2. Click **Edit**.
3. Set the default tax treatment.
If the default tax treatment doesn't point to a tax rate for the country where a product is shipped, the tax service returns an error.

SEE ALSO:

- [Select Salesforce Tax Solution and Assign a Tax Policy to a Store](#)
- [Configure Tax Rates and Treatments](#)
- [What Is the Salesforce Tax Solution?](#)

EDITIONS

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Taxing Items with Promotion Adjustments

Items that are part of a promotion or tier adjustment are taxed after the promotion amount is subtracted from the product price. The tax is calculated on the adjusted amount.

To calculate the gross tax, use this formula: $(grossPrice) * taxRate / (1+taxRate)$.

 **Example:** A cart contains three products, but 12 items in total.

- Product1: One item with a unit price of \$110. The tax rate is 10%. There's a 20% off promotion for this item.
- Product2: One item with a unit price of \$120. The tax rate is 20%. There's a 20% off promotion and a \$12 off coupon promotion for this item.
- Product3: Ten items with a regular unit price of \$99. The tiered promotion price is \$88 each when you order 10 or more. The tax rate is 10%.

The total tax is \$102.

- Product1: $(110-22)*.10/(1+0.10) = \8 tax
- Product2: $(120-24-12)*.20/1+.20 = \14 tax
- Product3: $(10*88)*.10/(1+0.10) = \$80$ tax

EDITIONS

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Segment a Store into Markets Based on Locale

Instead of standing up multiple stores for different regions, use one store and segment your customers into markets based on locale. When customers visit the store, they can choose their locale. Based on their selection, the store displays prices, promotions, and entitlements specific to their market. You can have a total of up to 25 active locales for a store across all markets. For example, your store could have one market with 25 locales or 25 markets with one locale each. A locale can be used only one time across all markets assigned to a store.

You can use markets for guests and authenticated shoppers on a B2C store and only for guest buyers on a B2B store. After buyers log in to a B2B store, they see the prices, promotions, and entitlements specific to their account.

[Considerations for Market and Buyer Group Setup](#)

As you set up your market and buyer groups, keep these considerations in mind.

[Set Up the Buyer Group Page to Support Markets in Commerce Stores](#)

Add the Locales related list to your Buyer Group object page. The Locales related list appears on all Buyer Group pages, even Buyer Groups that aren't of type Market, where locales aren't applicable. Configuring locales for non-Market Buyer Groups can cause errors.

[Configure a Market for Your Commerce Store](#)

Instead of standing up multiple stores for different regions, use one store and segment your customers into markets based on locale. To create a market, assign the price book, entitlement policy, currency, ship-to countries, and locales that it supports. After you create a market, you can also assign a promotion.

Considerations for Market and Buyer Group Setup

As you set up your market and buyer groups, keep these considerations in mind.

- Only the promotion segments that are assigned to the market apply to the products in the market. A store's defaults for language, ship-to country, price book, and currency settings aren't used after a segment is assigned to the market. These defaults don't apply if you're setting up a promotion segment in a buyer group.
- A product uses the lowest price found in all of the store's price books and markets. This behavior doesn't apply if you're setting up a new price book in a buyer group.
- Only the entitlement policies assigned to a market are used. Entitlement policies assigned to buyer groups aren't used.
- If you haven't assigned a ship-to country to a market or buyer group, the store's ship-to country is used.
- If you haven't assigned a locale to a market, entities assigned to the market are ignored, and the store defaults are used. This behavior doesn't apply when you assign locales to a buyer group.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

Set Up the Buyer Group Page to Support Markets in Commerce Stores

Add the Locales related list to your Buyer Group object page. The Locales related list appears on all Buyer Group pages, even Buyer Groups that aren't of type Market, where locales aren't applicable. Configuring locales for non-Market Buyer Groups can cause errors.

1. From the Object Manager, enter *Buyer Group* in the Quick Find box.
2. Select **Buyer Group** > **Page Layouts** > **Buyer Group Layout**.
3. In the Buyer Group Layout section, select **Related Lists**, and drag **Locales** to the Related List section.
4. Save your changes.

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Configure a Market for Your Commerce Store

Instead of standing up multiple stores for different regions, use one store and segment your customers into markets based on locale. To create a market, assign the price book, entitlement policy, currency, ship-to countries, and locales that it supports. After you create a market, you can also assign a promotion.

Before you create the market, create the price book and entitlement policy you want to use in the market so that they're ready to assign.


1. Create a market.
 - a. From your store's home page, click the **Administration** tile.
 - b. Click **Markets**.
 - c. Click **Create Market**.
A market is a special type of Buyer Group record where the Role field on the Buyer Group is set to Market.
 - d. Enter a market name and description, and click **Save**.

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2. Click **Related**.
3. Next to Price Books, click **Assign**, and select the price book for the market.
Make sure that the price book has entries in the currency that you want to use for your market.
4. Next to Commerce Entitlement Policies, click **Assign**, and select the entitlement policy for the market.
5. Next to Supported Ship-To Countries, click **Assign**, and move the ship-to countries for your market to the Chosen list.
Ship-to countries apply to all locales in the market.
6. (Optional) Select a market currency.
If you don't select a market currency, each locale in the market uses the currency assigned to that locale in the org. If you do select a market currency, it applies to all locales in the market and overrides the currency assigned to the locale in the org.
7. Click **Submit**.
8. Next to Locales, click **Assign**, select the locales for your market, and click **Assign**.
You can have a total of up to 10 active locales for a store across all markets. For example, your store could have one market with 10 locales or 10 markets with one locale each. A locale can be used only one time across all markets assigned to a store.
 **Important:** As soon as you add locales to a market, the market is active in the store.
9. From the store's home page, click the **Experience Builder** tile.
10. From Settings, select **Languages**.
11. Click **Edit Languages**. If necessary, adjust the languages so that the Site Languages include every language that you assigned to all locales in the market, and click **Save**.
12. In the components palette, drag the Country Selector component to a page in your store.
When a customer goes to your store, they can use the Country Selector to choose their locale. The locales available in the Country Selector are the locales that you added to the markets for the store.
13. At the top left of the Experience Builder, click **Publish**.
14. Rebuild the search index.
 - a. On your store's home page, click the **Search** tile.
 - b. Click **Search Index Summary**.
 - c. Select a full reindex, and click **Rebuild Index**.
Select a full reindex even if the partial reindex option is available.

To add a promotion to the market, assign it to the Buyer Group record that represents the market. See [Add a Promotion Segment](#).

Manage Translations

You can translate the product, category, and promotion text. If you're using product variations, you can also translate the variation attribute names. In Experience Builder, you can localize the store component labels.

[Localize Product, Category, and Promotion Data](#)

You can manually enter translated text for product and category names and descriptions. To translate promotion names and descriptions, you must use Translation Workbench. To perform bulk translations for product, category, or promotion data, use Translation Workbench.

[Localize Product Variation Data](#)

If you're using product variations, you can translate the variation attribute names into languages that your org supports to offer product variations in multiple locales.

[Localize Store Labels](#)

You can translate the labels for store components so that they display in the language of your store.

Localize Product, Category, and Promotion Data

You can manually enter translated text for product and category names and descriptions. To translate promotion names and descriptions, you must use Translation Workbench. To perform bulk translations for product, category, or promotion data, use Translation Workbench.

To do bulk translations, see [Translation Workbench](#). If your store uses multiple languages and Translation Workbench is enabled, translate product data for each store language, including the store's default language, in order for product fields to be searchable.

To manually localize product or category data:

1. Go to the product or category that you want to add translations to.
2. Click the **Translations** tab.
The Translations tab is available when you have Data Translation enabled for your org. See [Enable Data Translation](#).
3. Click **Add Translation**.
4. Select the language, and enter the translated product or category name and description.
5. To apply the translation, rebuild the search index. See [Rebuild the Commerce Search Index](#).

Localize Product Variation Data

If you're using product variations, you can translate the variation attribute names into languages that your org supports to offer product variations in multiple locales.

1. From Setup, in the Quick Find box, enter *Translate*, and then select **Translate**.
2. Under Select the filter criteria, enter these values.
 - Language—Select the language that you're translating to.
 - Setup Component—Select **Custom Field**.
 - Object—Select **Product Attribute**.
3. For each attribute, hover over the Field Label Translation column, and click the pencil icon to edit the field. Enter the translation for the field.
4. Repeat these steps for each language translation.

SEE ALSO:

[Product Variations and Attributes](#)

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Available In: B2B Commerce and D2C Commerce

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Localize Store Labels

You can translate the labels for store components so that they display in the language of your store.

Some component labels are translated for you into the selected language. For labels that are configurable using component properties, you can manually enter translated text. For B2B stores, you can use the export and import functionality to bulk translate store labels.

1. Localize store labels manually for B2B and B2C stores.
 - a. From the store's home page, click the **Experience Builder** tile.
 - b. At the top of the navigation bar, select the store's language from the world icon dropdown.
 - c. Enter the localized text in the component property fields.

The label text stays with the component for that language. If you select a different language, the component label text displays what you've entered for that language.
2. Localize store labels using export and import for B2B stores.



Note: Export and import functionality isn't currently available for B2C stores.

- a. From the store's home page, click the **Experience Builder** tile.
- b. Click the gear icon, and select **Languages**.
- c. Click **Export Content**.
- d. Enter a name for the export file.
- e. Click **Export**.

The export file is downloaded.
- f. Translate the labels in the export file.
- g. In Experience Builder, click the gear icon, and select **Languages**.
- h. Click **Import Translation**.
- i. Select the file with the translated labels to import into the store.

SEE ALSO:

[Export Language Content](#)

[Import Translated Content](#)

Store Customization

Use Experience Builder to create and design the pages in your store. Choose a theme, and mix and match Lightning components to add content. Configure lists, menus, and other settings as needed.

If you're using a B2B store built on an older Aura template, we recommend migrating the store to an LWR template. See the [B2B Commerce Aura to LWR Migration Guide](#).

[Use Experience Builder to Customize Your Store](#)

Make a B2B or B2C template yours by dragging components onto your page and customizing properties. With Experience Builder, you can add images and styles to your storefront to create a unique experience for your customers. You can also add markup to the `<head>` of every page.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available In: B2B Commerce and D2C Commerce

[Customize the Theme for Your Store](#)

You can change the colors, images, text size, and spacing of your store's template theme. The settings you configure for the template's theme apply across the storefront. You can override the theme in some components.

[Add Trusted Sites for Scripts](#)

If you require your store to access a script on an external host, add the external host as a trusted site.

[Assign a Page Layout for a Custom Header or Footer](#)

B2B and B2C stores created with the LWR template include responsive header and footer components. Alternatively, a developer can build a custom header or footer. For each page where you want to use a custom header or footer, you assign the commerce custom layout.

[Update the My Account Theme Layout](#)

The My Account theme layout provides persistent navigation on the left side of the page with page content appearing on the right. You can link to existing pages or create custom pages and add links to the layout's navigation menu. When you add navigation links to the menu, they appear on all pages that use the My Account layout.

[Configure Default Store Navigation](#)

Set up the default navigation of your B2B or B2C store to use product categories. Customers use the categories to navigate the store.

[Create a Footer Link List Menu](#)

By default, the Link List component is located in the footer of each page in your store. You can edit this component to link to pages that describe your company, your privacy policy, your return procedure, or other important information.

[Commerce Store Components](#)

Make a B2B or B2C template yours by dragging components onto your page and customizing their properties. Add images and styles to create a unique experience for your buyers or shoppers.

[Customize the Shopping Cart](#)

The Cart page is where customers can review everything they've added to their order before checking out. Edit the Cart page to customize how to show line item details, total costs, and savings. You can also style the checkout button, add a field for customers to enter coupon codes, and modify the cart badge.

[Customize Checkout](#)

The Checkout page is where customers enter their shipping and payment information to complete their order. Customize the Checkout page in Experience Builder to work with the shipping and payment services that are selected in your store settings.

[Profile Menu](#)

Configure the Profile Menu component to tailor the way guests and authorized buyers log in to your store and navigate to their account information and order history.

[Configure Displayable Product Fields](#)

Displayable product fields allow your store to retrieve product data faster on product, cart, and checkout pages. Select product fields that you want to make visible to customers and add them as displayable fields. Showing only the fields needed improves performance and makes the information more accessible to shoppers. Six fields are always selected by default for new orgs and additional fields are selected as needed.

[Buyer's Lists for B2B Aura Stores](#)

If you have a B2B store created with the Aura template, buyers can keep personal lists of products. Buyers can use lists in any way they like. For example, they can use lists to track past purchases, remind themselves of interesting products, and gather products for future purchase. A buyer can have up to 10 lists, and each list can contain up to 500 products.

[Use Real Data to Customize the Order Summary Pages in B2B Aura](#)

If you have a B2B store created with the Aura template, you can customize a store's order page or list of orders more effectively if you see real data in Experience Builder.

Use Experience Builder to Customize Your Store

Make a B2B or B2C template yours by dragging components onto your page and customizing properties. With Experience Builder, you can add images and styles to your storefront to create a unique experience for your customers. You can also add markup to the <head> of every page.

1. Navigate to your store page in Salesforce.
2. Click the **Experience Builder** tile.
3. Use themes, Lightning components, and other Experience Builder tools to style your store pages as needed.
4. Preview and publish your changes.

SEE ALSO:

[Manage Your Site's Pages and Their Properties in Experience Builder](#)

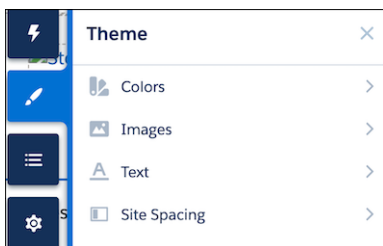
[Edit Pages and Components in Experience Builder](#)

[Page Properties and Types in Experience Builder](#)

Customize the Theme for Your Store

You can change the colors, images, text size, and spacing of your store's template theme. The settings you configure for the template's theme apply across the storefront. You can override the theme in some components.

1. On your store page in Salesforce, click the **Experience Builder** tile.
2. From the left menu, expand the Theme icon.



3. Expand an element of the theme, and select your settings.

SEE ALSO:

[Adjust the Style and Layout of Your Site Theme](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions

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EDITIONS

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Available in: B2B Commerce and D2C Commerce

Add Trusted Sites for Scripts

If you require your store to access a script on an external host, add the external host as a trusted site.

1. In Experience Builder, open the **Settings** menu (gear icon).
2. Click **Security**, and then click **+ Add Trusted Site**.
If you don't see the Add Trusted Site button, change the Security level setting from Strict: CSP to **Relaxed: CSP**. Then, click **Allow**. If you continue to have issues, turn off **Lightning Locker**.
3. Enter the required information.
 - a. Enter the name and URL.
 - b. Select **Active**.
 - c. Click **Add Site**.
4. Click **Add Site** again, and enter the required information.
 - a. Enter the trusted site name and the trusted site URL.
If you're not using enhanced domains, your My Domain URLs are different. See [My Domain URL Formats](#).
 - b. Select **Active**.
 - c. Click **Add Site**.
5. Confirm that the site names and URLs are active and listed under Trusted Sites for Scripts.

SEE ALSO:

[Store Customization](#)

Assign a Page Layout for a Custom Header or Footer

B2B and B2C stores created with the LWR template include responsive header and footer components. Alternatively, a developer can build a custom header or footer. For each page where you want to use a custom header or footer, you assign the commerce custom layout.

Complete these steps for each page where you want to use a custom header or footer.

1. In Experience Builder, click the gear icon on the page that you want to change.
2. In the Layout section, select the checkbox next to **Override the default theme layout for this page**.
3. From the Theme Layout dropdown, select **Commerce Custom Layout**.

The page now has blank top and bottom sections where the developer can add the custom header and footer. For more information, see [Build Custom Components](#).

SEE ALSO:

[Store Customization](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited,** and **Developer Editions**

Available in: B2B Commerce and D2C Commerce

EDITIONS

Available in: Lightning Experience


Available in: **Enterprise, Unlimited,** and **Developer Editions**

Available in: B2B and D2C Commerce

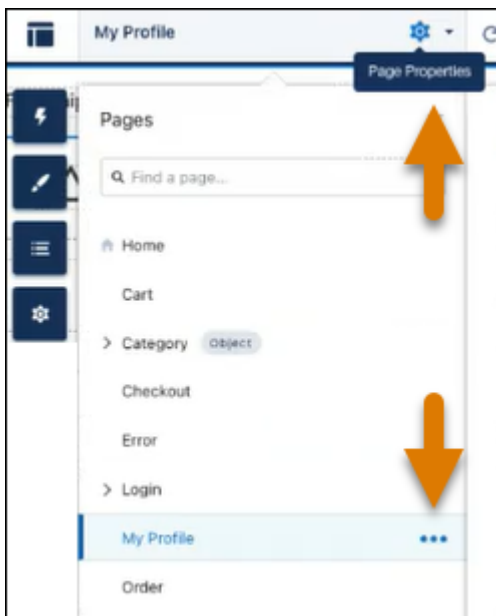
Update the My Account Theme Layout

The My Account theme layout provides persistent navigation on the left side of the page with page content appearing on the right. You can link to existing pages or create custom pages and add links to the layout's navigation menu. When you add navigation links to the menu, they appear on all pages that use the My Account layout.

B2B stores created with the LWR template, and B2C stores created as of the Winter '23 release, already have the My Account theme layout applied to the My Profile page. For an existing store, you can keep the current layout, or you can apply the new layout to all pages that you plan to include in your customers' My Account experience.

 **Note:** My Account uses a different theme layout than other pages, for example, the Home page. Let's say you change the Home page header and you want that change to appear on My Account pages. Make the same change to the header on a page that uses My Account Layout.

1. In Experience Builder, open the B2C Commerce store.
2. Go to the My Profile page.
3. Open the page actions.



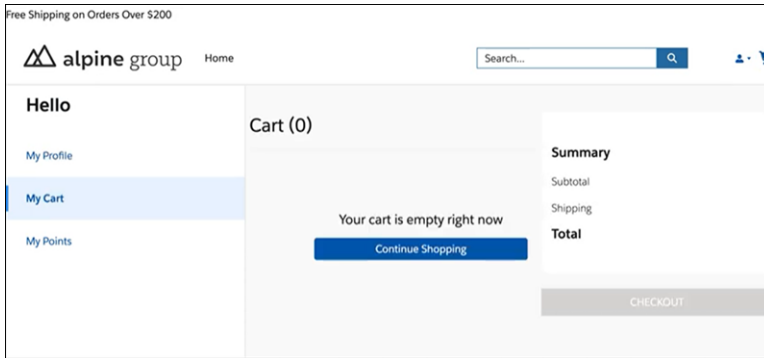
- Click the Page Properties icon (see image, top arrow), and select **My Profile**.
 - Click the ellipses icon. (see image, bottom arrow).
4. Select **Override the default theme layout for this page**.
 5. From the Theme Layout menu, select **My Account Layout**.
 6. Save your changes.
The layout is applied, and you can add standard and custom pages to the navigation menu.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce



When your My Account experience is set up, your customers can link directly to the My Account Foundation page. For example, you can apply the My Account Layout to your cart. When customers click the cart icon, they navigate directly to My Account Foundation. The Cart navigation item is selected, and the Cart page appears on the right.

SEE ALSO:

[Create Custom Pages with Experience Builder](#)
[Navigation Menu](#)

Configure Default Store Navigation

Set up the default navigation of your B2B or B2C store to use product categories. Customers use the categories to navigate the store.

Before a category can be included in store navigation, you mark it for inclusion in a menu. To select the categories to include, see [Create Categories and Subcategories](#) on page 69. Then rebuild your search index for the changes to take effect.

1. On your store page in Salesforce, click the **Experience Builder** tile.
2. Click the gear icon and select **Settings > Navigation**.
3. From the Default Navigation dropdown, select **Edit**.
4. Make sure that **Storefront Categories** is listed under the menu structure. If not, follow these steps to set up the store to use categories in the default navigation.
 - a. Click **Add Menu Item**.
 - b. From the Type dropdown, select **Data Source**.
 - c. From the Data Source dropdown, select **Storefront Categories**.
 - d. Select **Publicly available**.
5. (Optional) Add links to other pages in your storefront to the default navigation, in addition to the category links. For example, if you have a content page that describes your products or your company's initiatives, you can add a link to that page. The page link is displayed beside the category links.
 - a. Click **Add Menu Item**.
 - b. Enter a name for the menu item.
 - c. From the Type dropdown, select **Site Page**.
 - d. From the Data Source dropdown, select the page that you want to link to.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

- e. Select **Publicly available**.

6. Click **Save Menu**.

For a B2B store, if you want buyers and guest users to see only categories that have entitled products, contact Salesforce customer support to enable this functionality. To view a category or its descendent categories, the buyer or guest user must have entitlement to at least one product within the category. If a buyer has a direct link to a category that isn't entitled, the category still appears but doesn't show any products.

Create a Footer Link List Menu

By default, the Link List component is located in the footer of each page in your store. You can edit this component to link to pages that describe your company, your privacy policy, your return procedure, or other important information.

1. On your store page in Salesforce, click the **Experience Builder** tile.
2. Click the gear icon and go to **Settings > Navigation**.
3. Click **Add Navigation Menu**.
4. Enter a name for the menu, for example, *Footer Links*.
5. For each page that you want to add to the menu:
 - a. Click **Add Menu Item**.
 - b. From the Type dropdown, select **Site Page**.
 - c. Enter a name for the menu item, for example, *About Us*.
Shoppers see this label for the link.
 - d. From the Pages dropdown, select the page that you want to link to.
 - e. Select **Publicly available**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited,** and **Developer Editions**

Available in: B2B Commerce and D2C Commerce

6. Click **Save Menu**.

When you configure the Link List component, select the menu to display the links in the storefront footer.



SEE ALSO:

[LWR Store Components](#)

Commerce Store Components

Make a B2B or B2C template yours by dragging components onto your page and customizing their properties. Add images and styles to create a unique experience for your buyers or shoppers.

[LWR and Aura Store Templates](#)

Starting with Summer '23, all new B2B and B2C stores are built on the Lightning Web Runtime (LWR) platform. Some B2B stores still use the Aura platform and, in some places, the Commerce App UI and documentation still refer to Aura features and components. If you're using a new LWR store, you can ignore the Aura information.

[LWR Store Components](#)

Stores created with the B2B Commerce (LWR) or B2C Commerce (LWR) template share most of the same Commerce components in Experience Builder. In some cases, these components have different default settings based on the type of store. The B2B Reorder template is a streamlined option that excludes some components.

[Einstein Recommendations Component \(LWR\) for B2C Stores](#)

The Einstein Recommendations component personalizes the shopping experience and reduces the manual effort required to drive product discovery on your storefront.

[View All Components in the Menu](#)

You can configure the components menu to show all the components available in the template. Usually, the menu shows only the components designed for the page that you selected.

[Other Components for Your Store](#)

Store templates include Experience Builder components that aren't specific to commerce.

[Expressions in Commerce Components](#)

Expression Language is a specialized syntax that pulls data into an LWR component in Experience Builder. You can use expressions instead of static text to make your B2B or B2C store more customized and dynamic.

LWR and Aura Store Templates

Starting with Summer '23, all new B2B and B2C stores are built on the Lightning Web Runtime (LWR) platform. Some B2B stores still use the Aura platform and, in some places, the Commerce App UI and documentation still refer to Aura features and components. If you're using a new LWR store, you can ignore the Aura information.

Having all stores use the LWR platform allows you to build B2C and B2B stores using the same technology and components. LWR components use building blocks, which break up large components into smaller units, making it easier to customize components. For example, a Product Page can contain three multifunctional components with rich and varied features. Traditionally, customizing elements on the page required addressing all the components and rebuilding the entire page. The investment in time and resources can be steep.

With building block components, LWR store pages are broken into discrete units of functionality that are easier and faster to customize. For example, it's easier to add a custom variations component to the Product Page because you can swap out one component instead of rebuilding the entire page. You can drag building blocks onto a page from the Experience Builder component catalog as for other store components.

If you're using a B2B store built on an older Aura template, we recommend migrating the store to an LWR template. See the [B2B Commerce Aura to LWR Migration Guide](#).

SEE ALSO:

[Create a Store or Reorder Portal](#)

[LWR Store Components](#)

[B2B Commerce Aura to LWR Migration Guide](#)

LWR Store Components

Stores created with the B2B Commerce (LWR) or B2C Commerce (LWR) template share most of the same Commerce components in Experience Builder. In some cases, these components have different default settings based on the type of store. The B2B Reorder template is a streamlined option that excludes some components.

This table describes only the options listed in the Commerce section of the Components menu. Commerce templates also include other Experience Builder components.

Component	Description
Action Button	Shows a button for page level actions, such as Edit or Proceed.
Add Address Button	Shows a button that takes the customer to a form to add a shipping or billing address.
Address Form	Shows a form to collect shipping or billing address details. When a customer adds an address, they can choose to set it as their default.
Address List	Shows a customer their saved shipping and billing addresses, which they can edit or remove.
Applied Promotions	Shows a list of all manual and automatic promotions applied to the cart. The Applied Promotions component is a subcomponent of the Promotions component.
Billing Address	Shows a form to collect a billing address at checkout.
Breadcrumbs	Shows a link path to the current page in your store. Choose whether to include the home page at the start of the link path, and whether to set the last item as a link to the current page.
Cart	Contains the cart items component and a customizable empty cart state.
Cart Badge	Shows a clickable icon that takes the customer to their cart.
Cart Items	Shows the contents of the cart.
Cart Summary	Shows the total cost and savings in the cart, including the subtotal, promotions, shipping, and tax.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

Component	Description
Category Banner	Specify the color of the category name displayed on the banner. Make sure that the banner image has a landscape orientation. The recommended maximum height is 300 pixels. By default, the image is centered on the page.
Checkout Button	Shows a button that the customer clicks to begin the checkout process.
Checkout Header	Shows a simplified page header to keep customers focused on checkout. By default, this component includes the Site Logo and Cart Badge components.
Checkout Layout: Accordion	Shows an accordion layout at checkout, which contains sections that expand and collapse in a specific order. By default, this component includes other building block components.
Checkout Layout: One-Page	Shows a one-page layout at checkout with these sections that a customer can complete in any order. <ul style="list-style-type: none"> • Shipping section with the Contact Information, Shipping Address, and Shipping Instructions components • Shipping method section with the Shipping Method component • Payment section with the Payment, Billing Address, Checkout Notification, and Place Order Button components
Checkout Notification	Shows a message for a notification or error that occurs at checkout.
Checkout Section	Divides checkout into sections. Add a heading and checkout components to each section. See Set Up the Checkout Page on page 259
Commerce Header	Contains the components that you want to appear at the top of each page in your store. By default, this component includes the site logo, multilevel navigation menu, search input, profile menu, and cart badge.
Contact Information	Shows a form to collect email address and phone number details at checkout.
Country Selector	Shows a list of available countries based on the store's market configuration. The customer's selection determines which language, currency, prices, products, and promotions are shown.

Component	Description
Coupons	Shows a coupon field. The Coupons component is a subcomponent of the Promotions component. If your store doesn't have manual promotions, you can delete the Coupons component.
Currency Formatter	Formats currency for the customer's country.
Dual Payment (B2B only)	Shows a form to collect credit card or purchase order details at checkout. If you have Salesforce Payments, use the Salesforce Payments component instead.
Einstein Recommendations (B2C only)	Shows personalized product recommendations based on the customer's individual browsing behavior. See Einstein Recommendations Component for B2C Stores on page 243.
Express Checkout	Shows buttons for Express Checkout payment options. Requires Salesforce Payments.
Frequently Bought Together	Show customers products that are bought alongside the items that they're shopping for. Product recommendations are generated by Einstein and are based on customer interactions with the storefront.
Filters	Shows filters for search.
My Account Password	Shows a link for a customer to reset their password on their profile page.
My Profile	Shows the customer's name, email address, and phone number on their profile page.
Navigation List Menu	Displays a list of pages in your store. Usually appears in the left column on desktop computers and at the top of some mobile devices.
Order Amount	Shows a summary of costs and savings for a previous order.
Order Confirmation	Shows a confirmation message with the order reference number.
Order Details	Shows details about a previous order. By default, includes the date, account, order name, and status.
Order List	Shows a list of previous orders. Customers can filter, sort, and reorder items. To change the data displayed when a buyer switches to an external account, see Allow Buyers Access to External Accounts for B2B Stores on page 60.

Component	Description
Order Lookup	Shows a form where guest users enter their information to access their order details. Can be used only when guest access in your store is enabled.
Order Products	Shows the shipments and products for a previous order.
Order Summary Products (B2B only)	Shows a list of the products that are included in an order summary, grouped by delivery group.
Order Summary Promotions	Shows all promotions applied to a previous order.
Page Error Message	Shows an invalid page error message.
Payment	Shows a form to collect payment details at checkout. If you have Salesforce Payments, use the Salesforce Payments component instead.
Payment Processing	Shows a payment processing message when customers are redirected from a third-party site back to your store. Requires Salesforce Payments.
Place Order Button	Shows a button that completes the checkout process.
Product Attachments	Shows a list of links to files that are related to your products, such as a specification sheet or user guide. You specify the files to list on the product's Media tab in the Product Workspace.
Product Detail Headings	Shows a header with the name of the product, the SKU, and other product fields added from the builder properties.
Product Detail Purchase Options	Shows the Add to Cart button and quantity selector.
Product Details (Tabular)	Shows the product name and information in a table format.
Product Image Gallery	Shows one or more images of a product. You can select the direction of the carousel images.
Product Pricing Details	Shows discounted and promotional pricing details on the Product Detail page.
Product Pricing Information	Shows pricing and promotion information based on the store's price book.
Product Set	Shows the products in a product set.
Product Variants	Shows the variant selector dropdown menu to select a variation of the parent product.
Promotions	Shows a coupon field and the applied promotions. Contains the Coupons component and Applied Promotions component.

Component	Description
Purchase Order (B2B only)	Shows a field to collect a purchase order number at checkout. Only registered customers can generate a purchase order.
Quantity Selector	Controls the quantity of items to add to an order. Shows a number input field with clickable arrows that increase or decrease the value.
Quick Order	Shows a simple form for customers to enter SKUs to add products to their cart.
Reorder Button	Shows a button that lets customers start a new order based on a previous order.
Results	Shows products on results pages. Only customers who are entitled to access the associated products can view them in search results.
Results Layout	Contains components on results pages. For example, you can configure the Filters, Sort Menu, and Results components within the Results Layout component.
Salesforce Payments	Shows a form to collect payment details using Salesforce Payments at checkout. This component requires Salesforce Payments. If you have another payment provider, use the Dual Payment or Payment component instead. See Salesforce Payments .
Saved Payment Methods	Shows a customer's saved payment methods to use at checkout.
Shipping Address	Shows a form to collect a shipping address at checkout. Registered customers can use saved addresses.
Shipping Instructions	Shows a text field for shipping instructions at checkout.
Shipping Method	Shows radio buttons for shipping options at checkout. Shipping method options are pulled from shipping integration settings.
Shop by Category	Shows tiles for products grouped into categories.
Sort Menu	Shows a dropdown that the customer can use to sort search results.
Split Shipping Cart Item	Shows a list of cart items and their shipment details. Requires enabling Split Shipping.
Split Shipping Header	Shows a header to save or cancel a split shipment. Requires enabling Split Shipping.

Component	Description
Sticky Container	Contains the components that you want to remain on-screen during mobile scrolling.
Subscription Policy	Shows a subscription policy disclaimer. This component shows only if a subscription is in the cart.
Tiered Discounts	Shows tiered discounts for a product, if available. See Set Up Price Tiering on page 100.
Top Sellers	Shows products in a category that you specify. Enter the ID of the category to display. If you don't specify a top sellers category, the header text doesn't display on the page.
Wishlist	Shows all the products in a customer's wishlist.
Wishlist Product	Shows a product in a customer's wishlist. Includes options to add the product to a cart or remove it from the wishlist.

Einstein Recommendations Component (LWR) for B2C Stores



The Einstein Recommendations component personalizes the shopping experience and reduces the manual effort required to drive product discovery on your storefront.






EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: D2C Commerce


Property	Details
Recommendations Definition	
Anchor	Select an option to use as initial input for making recommendations on this page. Selecting the Product ID or Catalog ID anchor shows a field where you must add a product or catalog ID to complete your selection.
Product ID	Add a site-specific product ID starting with 01t. This field appears only when you select the Product ID anchor.  Tip: To find the product ID, select a specific product in the Commerce App and copy the product ID from the browser URL.
Catalog ID	Add a site-specific catalog ID starting with 0ZG. This field appears only when you select the Catalog ID anchor.  Tip: To find the catalog ID, select a specific product in the Commerce App and copy the catalog ID from the browser URL.
Use Case	Select the recommendation outcome that you want shoppers to see. Choose from recently viewed, similar products, and the like. Use cases have predefined strategies and rules that respond to shopper interactions in real time.

Property	Details
	<p> Note: Selections for use cases change dynamically based on the page containing the component and the anchor that you select.</p> <p>See the Usage Notes for details about each use case.</p>
Header Text	<p>Enter text to show at the top of the Einstein recommendations carousel.</p> <p> Note: Header text appears to shoppers only when recommendations are generated and when the number of recommendations exceeds the value defined for the <code>Hide for Results Fewer Than</code> parameter.</p>
Maximum Products Visible	<p>Set the maximum number of products to show before advancing the recommendations carousel to the next set of products. The default is 4.</p> <p> Note: Regardless of this setting, mobile devices show a maximum of two recommendations at a time. If you choose to show the quantity selector and call to action button, mobile devices display only one recommendation at a time.</p>
Hide for Results Fewer Than	<p>Set a minimum number of products to show. If there are fewer products than the number specified, the component doesn't appear. The default is two products.</p>
Display Options	
Product Text	<p>Select to show the product name for each product recommended.</p>
Price	<p>Select to show price information for each product recommended. When selected, you can choose whether to show the sale price with the original price crossed out or only the sale price.</p>
Quantity Selector and Call to Action Button	<p>Select to show the quantity selector and the call to action button. When selected, you can also change the quantity selector label text and the text that appears in the call to action button.</p> <p> Note: Selecting this option limits the display to one recommendation at a time for mobile devices.</p>
Price options menu	<p>Choose between <code>Sale Price with Original Price Crossed Out</code> or <code>Sale Price</code>. This parameter appears only when the <code>Price</code> option is selected.</p>
Quantity Selector Label	<p>Change the label text associated with the quantity selector. The default is <code>qty</code>. This parameter appears only when the <code>Quantity Selector and Call to Action Button</code> option is selected.</p>
Call to Action Button Text	<p>Change the text that appears in the call to action button. The default is <code>Add To Cart</code>. This parameter appears only when the <code>Quantity Selector and Call to Action Button</code> option is selected.</p> <p> Note: Inventory availability isn't checked when products are added to the cart using Einstein recommendations.</p>

Usage Notes

Commerce Einstein can provide product recommendations based on shopper activity. You can add one or more Einstein Recommendations components to any page in B2C stores. You can customize the Einstein components using supported anchors and related use cases.


The Category Viewed anchor is supported on only Category pages. All other anchors are supported on any page, but they're intended for use on certain pages.

 **Note:** Adding Einstein Recommendations components to page headers and footers isn't supported.


When you select an anchor for a page, the use case menu changes to show only the supported options for that anchor.


Anchor	Intended Pages	Supported Use Cases
No Anchor	Home, Search, Error, My Profile, Service Not Available	Recently Viewed, Top Selling, Personalized for Shopper
Product ID	Home, Error, My Profile, Service Not Available	Recently Viewed, Similar Products, Complementary Products, Customers Also Bought
Product Viewed	Product	Recently Viewed, Similar Products, Complementary Products, Customers Also Bought
Products in Cart	Cart, Checkout, Order	Recently Viewed, Similar Products, Complementary Products, Customers Also Bought, Upsell
Category ID	Home, Error, My Profile, Service Not Available	Recently Viewed, Most Viewed By Category, Top Selling By Category
Category Viewed	Category	Recently Viewed, Most Viewed By Category, Top Selling By Category

A use case defines the type of recommendations that Commerce Einstein shows. The strategies listed in the table are in order of occurrence. If there isn't enough shopper activity for the first strategy listed, the next strategy on the list is used. The Text Similarity strategy works even when there's no shopper activity.

 **Note:** All use cases, except Recently Viewed, can have up to 20 products for recommendations. The Recently Viewed use case shows up to the last 10 browsed products.


Use Case	Strategies	Description
Recently Viewed	Last browsed products	Generates recommendations based on items that the shopper recently viewed.
Similar Products This use case recommends products that match the category of the product being viewed.	1. Customers who viewed also viewed	Generates recommendations by analyzing the viewing behavior of other shoppers who viewed the same product.
	2. Product affinity algorithm	Generates recommendations by analyzing the product's similarity to other products.
	3. Text similarity	Uses natural-language processing to generate product recommendations based on similarity between products in product details.
Complementary Products	1. Real-time personalized recommendations	Generates recommendations by analyzing the shopper's current viewing and past viewing behavior.

Use Case	Strategies	Description
This use case recommends products that don't match the category of the product being viewed.	2. Customers who viewed also viewed	Generates recommendations by analyzing the viewing behavior of other shoppers who viewed the same product.
	3. Text similarity	Uses natural-language processing to generate product recommendations based on similarity between products in product details.
Customers Also Bought This use case doesn't show products purchased by the shopper in the past 30 days.	1. Customers who bought also bought	Generates recommendations by analyzing the purchasing behavior of other shoppers who bought the same product.
	2. Customers who viewed ultimately bought	Generates recommendations by analyzing the purchasing behavior of other shoppers who viewed the same product.
	3. Text similarity	Uses natural-language processing to generate product recommendations based on similarity between products in product details.
Most Viewed By Category	Recent most-viewed products from category	Generates recommendations by analyzing which products other shoppers recently viewed in the same category for the product being viewed.
Top Selling By Category	Recent top-selling products for the category within the past 30 days	Generates recommendations by analyzing which products were recently purchased by other shoppers in the category being viewed.  Note: This strategy uses a rolling 30-day time frame that updates daily to return recommendations that are similar to top sellers found in your weekly sales reporting.
Upsell	1. Customers who bought also bought	Generates recommendations by analyzing the purchasing behavior of other shoppers who bought the same product.
	2. Customers who viewed ultimately bought	Generates recommendations by analyzing the purchasing behavior of other shoppers who viewed the same product.
	3. Customers who viewed also viewed	Generates recommendations by analyzing the viewing behavior of other shoppers who viewed the same product.
	4. Text similarity	Uses natural-language processing to generate product recommendations based

Use Case	Strategies	Description
		on similarity between products in product details.
Top Selling	Top-selling products within the past 30 days	Generates recommendations by analyzing which products were recently purchased by other shoppers.  Note: This strategy uses a rolling 30-day time frame that updates daily to return recommendations that are similar to top sellers found in your weekly sales reporting.
Personalized for Shopper	1. Real-time personalized recommendations	Generates recommendations by analyzing current and past viewing behavior of the shopper.
	2. Recent most-viewed products	Generates recommendations by analyzing which products other shoppers recently viewed.

Recommended For You


<



GoGoo Green Tea Boo...
\$49.99 ~~\$54.99~~

QTY


ADD TO CART



Alpine Blends French Ro...
\$19.99

QTY


ADD TO CART



Alpine Energy Eco Pod, T...
\$12.99

QTY

ADD TO CART



GoBAR Green Tea 12 Pa...
\$22.50 ~~\$24.99~~

QTY

ADD TO CART

>

View All Components in the Menu

You can configure the components menu to show all the components available in the template. Usually, the menu shows only the components designed for the page that you selected.

1. From Experience Builder, click the gear icon and go to **Settings > Advanced**.
2. Under Components Panel, select **Show all components**.

SEE ALSO:

[Commerce Store Components](#)

[Standard Components for LWR Templates](#)

Other Components for Your Store

Store templates include Experience Builder components that aren't specific to commerce.

Here are some examples of other types of Experience Builder components that are included in store templates.

- **HTML Editor**—Create and edit custom content in HTML.
- **Tile Menu**—Add visual interest to your site with tile-based navigation.
- **Language Selector**—Offer language options in a dropdown menu.
- **Contact Support Form**—Give guests and authenticated users a way to enter a support case from your store.

SEE ALSO:

[Which Components Can I Use with Each Aura Template?](#)

[Standard Components for LWR Templates](#)

Expressions in Commerce Components

Expression Language is a specialized syntax that pulls data into an LWR component in Experience Builder. You can use expressions instead of static text to make your B2B or B2C store more customized and dynamic.

[Adding an Expression to a Commerce Component](#)

Enter expressions into any LWR component on a page with data providers. In some components, you can select an expression from a provided list. You can also combine expressions or add values.

[Control When a Component Is Visible](#)

Create dynamic visibility rules to control when a component is visible on the storefront. Use Expression-Based Visibility (EBV) to show and hide storefront components based on ecommerce data-driven conditional expressions.

[Create Multiple Versions of a Component](#)

Create multiple versions of a component, and assign visibility rules to target specific customer groups with each variation. Use Component Variations to tailor the shopping experience for different customers.

[Cart Data Expressions](#)

Use these data expressions in any component on the cart page.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

[Order Data Expressions](#)

Use these data expressions in any component on the order summary details page.

[Product Data Expressions](#)

Use these data expressions in any component on the product page.

[Search Data Expressions](#)

Use these expressions in any component on the Search page.

SEE ALSO:

[Use Expressions to Add Dynamic Data to LWR Sites](#)

Adding an Expression to a Commerce Component

Enter expressions into any LWR component on a page with data providers. In some components, you can select an expression from a provided list. You can also combine expressions or add values.

B2B and B2C Store Pages with Data Providers

The expressions that you can use in a component depend on which data providers are available on the page. Pages with Commerce-related data provider components are:

- Cart page—Access cart details and totals
- Checkout page—Access checkout details
- Order Summary page—Access order data
- Product page—Access product data
- Search page—Access search data

Other places where data providers are available include:

- Record Detail page—Access record data for supported objects through expressions, such as `{!Item.recordField}`. See [All Supported Objects](#).
- Any page—Access CMS content through the Banner, Card, Overlap, and Tile components. See [Use Expressions in LWR Sites](#).

Built-In Expressions

If a component includes built-in expressions, the Inherited Content field specifies which data is available. The component also includes a field where you can enter text or select an available expression.

For example, in this text block on a Cart page, the inherited content is Commerce Cart Data.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

Text Block ▼ ×

Use text stored in Salesforce or add content in the text box.

Inherited Content

Commerce Cart Data

Text or Expression

Select a field... 🔗

Store ID
`{!Cart.Details.webstoreId}`

Account ID
`{!Cart.Details.accountId}`

The available expressions shown pull in the store ID and the account ID associated with the cart.

The components with properties that indicate the presence of a data provider are: Banner, Button, Card, Grid, HTML Editor, Image, Overlap, Rich Content Editor, Text Block, Tile, and Video.

Example:

- Show an offer that's based on whether the unit price is more than \$100.
`{!Product.Pricing.unitPrice > 100}`—Returns true or false depending on whether the unit price is larger than 100.
- Create an offer based on whether the list price is less than the unit price.
`{!Product.Pricing.listPrice < Product.Pricing.unitPrice}`—Returns true or false depending on whether the list price is smaller than the unit price.
- Show special deals based on a product's brand.
`{!Product.Details.fields.Name == 'someName'}`—Returns true when the product name equals 'someName'.
- Highlight customer savings.

`{!+Order.totalAmount - (+Order.adjustmentAggregates.totalProductPromotionDistAmount)}` —Returns the difference between the total amount and the promotion distribution amount.

- Show a product count next to the heading in the Cart Summary component.

`Summary ({!Cart.Details.totalProductCount})` —Returns “Summary (X),” where X is the number of products in the cart.

Control When a Component Is Visible

Create dynamic visibility rules to control when a component is visible on the storefront. Use Expression-Based Visibility (EBV) to show and hide storefront components based on ecommerce data-driven conditional expressions.

For more information see [Expressions-Based Visibility in Enhanced LWR Sites](#).

Create Multiple Versions of a Component

Create multiple versions of a component, and assign visibility rules to target specific customer groups with each variation. Use Component Variations to tailor the shopping experience for different customers.

For more information see [Create Component Variations in LWR Sites](#).

SEE ALSO:

[Component Variations in Enhanced LWR Sites](#)

Cart Data Expressions

Use these data expressions in any component on the cart page.

Data	Expression	Description
Account ID	<code>{!Cart.Details.accountId}</code>	ID of the cart account.
Cart ID	<code>{!Cart.Details.cartId}</code>	ID of the cart.
Cart Items	<code>{!Cart.Items}</code>	Collection of cart item results.
Cart Name	<code>{!Cart.Details.name}</code>	Name of the cart.
Cart Status	<code>{!Cart.Details.status}</code>	Status of the cart. Values are: <ul style="list-style-type: none"> • Active

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited,** and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited,** and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited,** and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Data	Expression	Description
		<ul style="list-style-type: none"> Checkout Closed PendingDelete Processing
Cart Type	{!Cart.Details.type}	Type of cart. Value is Cart.
Charges	{!Cart.Totals.chargeAmount}	Total amount for shipping and other charges in the currency of the cart.
Contains Subscriptions	{!Cart.Details.containsSubscription}	Cart contains items with subscriptions.
Currency ISO Code	{!Cart.Details.currencyIsoCode}	Three-letter ISO 4217 currency code associated with the cart.
Grand Total	{!Cart.Totals.grandTotal}	Grand total amount, including shipping and tax, for items in the cart, in the currency of the cart.
Original Total	{!Cart.Totals.listPrice}	Total list price for the cart.
Product Count	{!Cart.Details.totalProductCount}	Total count of items in the cart.
Promotions Total	{!Cart.Totals.promotionalAdjustmentAmount}	Total amount of promotion adjustments.
Store ID	{!Cart.Details.webstoreId}	ID of the cart's web store.
Subscription Product Count	{!Cart.Details.totalSubscriptionProductCount}	Number of cart items that contain subscriptions.
Subtotal	{!Cart.Totals.productAmount}	Total amount, including discounts, but excluding shipping and tax, for product items in the cart.
Subtotal With Promotions	{!Cart.Totals.productAmountAfterAdjustments}	Total product amount, including promotions.
Tax Total	{!Cart.Totals.taxAmount}	Total tax amount for the cart, including tax on shipping, if applicable.
Tax Type	{!Cart.Details.taxType}	Tax type of the cart. Values are: <ul style="list-style-type: none"> Gross Net
Unique Product Count	{!Cart.Details.uniqueProductCount}	Total count of unique items, or SKUs, in the cart.

Order Data Expressions

Use these data expressions in any component on the order summary details page.

- `{!Order.Details.orderSummaryId}`
- `{!Order.Details.status}`
- `{!Order.Details.orderNumber}`
- `{!Order.Details.orderedDate}`
- `{!Order.Details.createdDate}`
- `{!Order.Details.totalAmount}`
- `{!Order.Details.ownerId}`
- `{!Order.Details.currencyIsoCode} {!Order.Details.AccountId.text}`
- `{!Order.Details.ActiveProcessExceptionCount.text}`
- `{!Order.Details.fields.BillingStreet.text}`
- `{!Order.Details.fields.BillingAddress.text}`
- `{!Order.Details.fields.BillingEmailAddress.text}`
- `{!Order.Details.fields.BillingPhoneNumber.text}`
- `{!Order.Details.fields.BusinessModel.text}`
- `{!Order.Details.fields.ChangeOrderId.text}`
- `{!Order.Details.fields.BillingCity.text}`
- `{!Order.Details.fields.CloneSourceId.text}`
- `{!Order.Details.fields.BillToContactId.text}`
- `{!Order.Details.fields.BillingCountry.text}`
- `{!Order.Details.fields.CreatedById.text}`
- `{!Order.Details.fields.CreatedDate.text}`
- `{!Order.Details.fields.CurrencyIsoCode.text}`
- `{!Order.Details.fields.Description.text}`
- `{!Order.Details.fields.ExternalReferenceIdentifier.text}`
- `{!Order.Details.fields.TotalFeeAmount.text}`
- `{!Order.Details.fields.TotalFeeTaxAmount.text}`
- `{!Order.Details.fields.TotalFeeAmountWithTax.text}`
- `{!Order.Details.fields.TotalAdjustedFeeAmount.text}`
- `{!Order.Details.fields.TotalAdjustedFeeTaxAmount.text}`
- `{!Order.Details.fields.BillingGeocodeAccuracy.text}`
- `{!Order.Details.fields.LastModifiedById.text}`
- `{!Order.Details.fields.lastModifiedDate.text}`
- `{!Order.Details.fields.LastReferencedDate.text}`
- `{!Order.Details.fields.LastViewedDate.text}`
- `{!Order.Details.fields.BillingLatitude.text}`
- `{!Order.Details.fields.BillingLongitude.text}`
- `{!Order.Details.fields.TotalAdjDistAmount.text}`
- `{!Order.Details.fields.TotalAdjDistTaxAmount.text}`

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer Editions**

Available in: B2B Commerce and D2C Commerce

- `{!Order.Details.fields.TotalAdjDistAmountWithTax.text}`
- `{!Order.Details.fields.TotalFeeAdjDistAmount.text}`
- `{!Order.Details.fields.TotalFeeAdjDistTaxAmount.text}`
- `{!Order.Details.fields.TotalFeeAdjDistAmtWithTax.text}`
- `{!Order.Details.fields.OrderLifeCycleType.text}`

Product Data Expressions

Use these data expressions in any component on the product page.

Expression	Description
<code>{!Product.Details.id}</code>	ID of the product.
<code>{!Product.Details.fields.isActive}</code>	Indicates whether the product is active or not.
<code>{!Product.Details.fields.isArchived}</code>	Indicates whether the product is archived.
<code>{!Product.Details.fields.CreatedById}</code>	ID of the user who created the product.
<code>{!Product.Details.fields.CreatedDate}</code>	Date the product was created.
<code>{!Product.Details.fields.CurrencyIsoCode}</code>	Three-letter ISO 4217 currency code associated with the product.
<code>{!Product.Details.fields.IsDeleted}</code>	Indicates whether the object has been moved to the Recycle Bin or not.
<code>{!Product.Details.fields.DisplayUrl}</code>	Display URL of the product.
<code>{!Product.Details.fields.ExternalDataSourceId}</code>	External data source ID of the product.
<code>{!Product.Details.fields.ExternalId}</code>	External ID of the product.
<code>{!Product.Details.fields.LastModifiedById}</code>	ID of the user who last modified the product.
<code>{!Product.Details.fields.LastModifiedDate}</code>	Timestamp for when the current user last modified the product.
<code>{!Product.Details.fields.LastReferencedDate}</code>	Timestamp for when the current user last viewed a record related to the product.
<code>{!Product.Details.fields.LastViewedDate}</code>	Timestamp for when the current user last viewed the product.
<code>{!Product.Details.fields.ProductClass}</code>	Product class of the product.
<code>{!Product.Details.fields.ProductCode}</code>	Product code of the product.
<code>{!Product.Details.fields.Description}</code>	Description of the product.
<code>{!Product.Details.fields.Family}</code>	Family of the product.
<code>{!Product.Details.fields.id}</code>	ID of the product.
<code>{!Product.Details.fields.Name}</code>	Name of the product.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

Expression	Description
{!Product.Details.fields.StockKeepingUnit}	Stock keeping unit of the product.
{!Product.Details.fields.Type}	The type of the product. Values are: <ul style="list-style-type: none"> • Base • Null Values are: Base Null
{!Product.Details.fields.QuantityUnitOfMeasure}	Unit of the product, for example, kilograms, liters, or cases.
{!Product.Details.fields.SystemModstamp}	ISO 8601 date string indicating when a user or any automated system process, such as a trigger, updated the file.
{!Product.Details.fields.TaxPolicyId}	ID of the related tax policy.
{!Product.Details.defaultImage.canViewPrice}	Specifies whether the product's price can be viewed (true) or not (false).
{!Product.Details.defaultImage.id}	ID of the default image for the product.
{!Product.Details.defaultImage.url}	URL for the default image for the product.
{!Product.Details.defaultImage.thumbnailUrl}	URL of the thumbnail for product media.
{!Product.Details.defaultImage.title}	Title of the product media.
{!Product.Details.defaultImage.alternateText}	Alternative text for the product media.
{!Product.Details.defaultImage.sortOrder}	Sort order of a media item within a media group.
{!Product.Details.defaultImage.mediaType}	Type of product media. Values are: <ul style="list-style-type: none"> • Document • Image • Video
{!Product.Details.defaultImage.contentVersionId}	ID of the latest published content version if the media is stored as a ContentDocument. If the image is a customer-provided external URL, the value is null.
{!Product.Details.variationParentId}	ID of the variation parent.
{!Product.Details.productClass}	Class of the product. Values are: <ul style="list-style-type: none"> • Simple • Variation • VariationParent
{!Product.Details.variationAttributeSet.id}	Variation attribute set for the product.
{!Product.Details.variationAttributeSet.developerName}	Unique name of the object in the API.
{!Product.Details.purchaseQuantityRule.minimum}	Minimum quantity of a product that can be purchased.
{!Product.Details.purchaseQuantityRule.maximum}	Maximum quantity of a product that can be purchased.

Expression	Description
{!Product.Details.purchaseQuantityRule.increment}	Increment value of the quantity that can be purchased.
{!Product.Pricing.pricebookEntryId}	ID of the price book entry for the product.
{!Product.Pricing.listPrice}	List price for the product.
{!Product.Pricing.unitPrice}	Unit price for the product.
{!Product.Pricing.currencyIsoCode}	Three-letter ISO 4217 currency code associated with the product.
{!Product.Pricing.priceAdjustment.id}	Price adjustment schedule for the product.
{!Product.Tax.taxLocaleType}	Tax type of the store. Values are: <ul style="list-style-type: none"> Gross—Prices include tax Net—Prices don't include tax
{!Product.SelectedVariant.isValid}	Indicates if the selected variant is a valid product or not.
{!Product.SelectedVariant.options}	Provides options of the selected variant.

Search Data Expressions

Use these expressions in any component on the Search page.

Data	Expression	Description
Product Cards	{!Search.Results.cardCollection}	The collection of data displayed in a product card in search results.
Filters	{!Search.Results.filtersPanel}	The data displayed in the filters panel.
Locale	{!Search.Results.locale}	Locale of the search results.
Page Size	{!Search.Results.pageSize}	Number of products per page in the search result.
Total	{!Search.Results.total}	Number of products in the search result across all pages.
Category Name	{!Search.Results.categoryName}	The selected category name.
Description	{!Search.Results.description}	The search and category header title based on results data.
Sort Rules	{!Search.SortRules.rules}	The list of available sort rules.
Current Sort Rule	{!Search.SortRules.currentSortRuleId}	The selected sort rule.
Total Pages	{!Search.Pagination.totalPages}	The number of pages in the search result.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

Data	Expression	Description
Current Page	{!Search.Pagination.currentPage}	The current page number in the search result.
Start Index	{!Search.Pagination.startIndex}	The starting index of items displayed in the list.
End Index	{!Search.Pagination.endIndex}	The last index of items displaying in the list.

Customize the Shopping Cart

The Cart page is where customers can review everything they've added to their order before checking out. Edit the Cart page to customize how to show line item details, total costs, and savings. You can also style the checkout button, add a field for customers to enter coupon codes, and modify the cart badge.

1. On your store page, open Experience Builder.
2. Go to the Cart page.
3. Customize the Cart component.

The Cart component contains the Cart Items component, along with an empty state that shows when the customer hasn't added any items to their cart.

- a. In the Cart component properties, select whether to show sort options. This setting is enabled by default for B2B stores.
- b. Click the empty state text to customize it.

4. Customize the Cart Items component.

The Cart Items component shows the products in the cart, along with the related details that you want to include.

- a. To add a button so that customers can delete a line item from their cart, select **Show remove item option**. This option is enabled by default.
- b. To add a button so that your customers can view more line items in their cart, select **Show more items option**. This option is enabled by default.
- c. To show the total price for each line item, select **Show line item total**. This option is enabled by default.
- d. In the Product Details section, select which information to show for each line item.
- e. In the Price Per Unit section, select whether to show the price per unit and customize the style.
- f. In the Original Price and Actual Price sections, select which prices to show and customize the style. The original price is the base price from the store's original price book. The actual price is the final price for the current customer. If the original price is higher than the actual price, it's crossed out.

The original price is the base price from the store's original price book. The actual price is the final price for the current customer. If the original price is higher than the actual price, it's crossed out.

- g. In the Promotion Details section, select whether to show the promotions for a line item and customize the style.
 - h. In the Quantity Selector section, edit the text for the quantity selector rules. Quantity rules apply in B2B stores only.
5. Customize the Cart Summary component.
- The Cart Summary component shows a list of total costs and savings in the cart.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited,** and **Developer Editions**

Available in: B2B Commerce and D2C Commerce

- a. In the Cart Summary properties, select whether to show the original price, subtotal, promotions total, shipping total, and tax total.
 - b. If your store tax type is Gross, select whether to show note that tax is included.
 - c. In the Style section, edit the design properties.
 - d. Click the text in the component to customize it.
6. Customize the Checkout Button component.
By default, the Checkout Button component is inside a Sticky Container builder component, so the checkout button remains on screen during mobile scrolling.
7. Customize the Promotions component to show a coupon field and a list of applied promotions.
8. (Optional) If you have Salesforce Payments and you want to provide digital wallet payment options, add the Express Checkout component.
Express Checkout supports Apple Pay, Google Pay, PayPal, and Venmo. In the component properties panel, enter a payment method set key and make other customizations as needed.
9. Preview and publish your changes.

After you customize the Cart page, customize the Cart Badge in the header of your store. The Cart Badge is a clickable icon that takes customers to the Cart page. You can configure the badge to show the number of items in the cart and whether the number reflects total items or total unique items.

SEE ALSO:

[Commerce Store Components](#)

[Salesforce Payments](#)

[Add a Payment Service for Store Checkout](#)

Customize Checkout

The Checkout page is where customers enter their shipping and payment information to complete their order. Customize the Checkout page in Experience Builder to work with the shipping and payment services that are selected in your store settings.

[Set Up the Checkout Page](#)

Add components to a store to guide customers through the checkout process.

[Customize Shipping in Checkout](#)

After you set up your shipping calculation service, use Experience Builder to customize how you collect shipping details from your customers in checkout.

[Customize Payments in Checkout](#)

After you set up your payment service provider, use Experience Builder to customize how you collect payment and billing details from your customers in checkout.

[Enable Split Shipping for Commerce Stores](#)

Let customers ship items in one order to multiple locations. At checkout, customers can split a single cart into multiple shipments using delivery groups. Customers can specify a shipping method and destination for up to 10 delivery groups per order by default.

Set Up the Checkout Page

Add components to a store to guide customers through the checkout process.

If your B2B store was created with the Aura template, use flows to edit checkout. See [B2B Commerce Checkout Flow](#).

1. In Experience Builder, select the **Checkout** page.

If you're creating a store, the checkout page displays the one-page layout with preconfigured sections and components.

If you have a store created before the Winter '24 release, you can replace legacy components. Legacy components are still supported, but they don't support new commerce features. If you choose to replace the legacy components, you can't add them back.

If you have a B2B store with Guest Checkout enabled, you must replace the legacy components or email verification fails at checkout.

2. From the component menu, select Checkout Layout: One-Page or Checkout Layout: Accordion.

The one-page layout displays all checkout sections and forms on a single page. The accordion layout contains sections that expand and collapse as customers complete the checkout steps. To update the navigation button label for each section, customize the Action Button component.

If your store was created before the Winter '24 release, add the Place Order Button and Checkout Error Notification components after adding a layout component.

3. Edit the checkout sections.

Each Checkout Section component contains a heading, an Action Button component, and content space for components. To change the section title, edit the header. You can add and remove sections, and add or remove components within a section.

SEE ALSO:

[Customize Payments in Checkout](#)

[Customize Shipping in Checkout](#)

[LWR Store Components](#)

Customize Shipping in Checkout

After you set up your shipping calculation service, use Experience Builder to customize how you collect shipping details from your customers in checkout.

1. In Experience Builder, select the **Checkout page**.
2. Click the **Shipping Address** component to customize it, or add it to the appropriate section in your layout.
 - a. Select whether to show only the customer's default shipping address. For this setting, if a registered customer has a saved shipping address set as their default, it's preselected in checkout. Customers can choose to edit it or add an address.
 - b. Edit the address list and address form settings as needed.
3. Click the **Shipping Method** component to customize it, or add it to the appropriate section in your layout.

This component pulls shipping options from the shipping integration. See [Add a Shipping Calculation Service](#) on page 105.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

4. If your store allows guest shopping, click the **Contact Information** component, or add it to the appropriate section in your layout. This component is required if you've turned on guest access to checkout. See [Manage Guest Access](#) on page 62.
5. (Optional) Click the **Shipping Instructions** component, or add it to your layout. To suggest what type of information a customer should include, edit the properties to add placeholder text.
6. Preview and publish your changes.

SEE ALSO:

[Add a Third-Party Shipping Service to a Commerce Store](#)
[Commerce Store Components](#)

Customize Payments in Checkout

After you set up your payment service provider, use Experience Builder to customize how you collect payment and billing details from your customers in checkout.

1. In Experience Builder, select the **Checkout page**.
2. In the Payment section of your layout, add or customize a payment component.
 - If you have Salesforce Payments, use the Salesforce Payments component. Enter a payment method set key, select whether to use manual capture, select whether to enable saved payments, and make other customizations as needed. If you have a B2B store, you can also choose to show a purchase order option.
 - If you have a third-party payment provider, use the Payment or Dual Payment component (B2B only). The Payment component includes a credit card option. The Dual Payment component includes both a credit card option and a purchase order option.
 - If you want your B2B store to accept purchase orders only, use the Purchase Order component.
3. (Optional) If you have Salesforce Payments and you want to provide digital wallet payment options, add the Express Checkout component.

Express Checkout supports Apple Pay, Google Pay, PayPal, and Venmo. In the component properties panel, enter a payment method set key and make other customizations as needed.
4. Add or customize the Billing Address component.

The Payment component includes a Billing Address component by default.
5. (Optional) If you have Salesforce Payments, customize the Payment Processing page.

If you offer a payment option that sends your customers to a third-party site during checkout, this page redirects them back to your store.
6. Preview and publish your changes.

SEE ALSO:

[Salesforce Payments](#)
[Add a Payment Service for Store Checkout](#)
[Commerce Store Components](#)
[Set Up the Checkout Page](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

Enable Split Shipping for Commerce Stores

Let customers ship items in one order to multiple locations. At checkout, customers can split a single cart into multiple shipments using delivery groups. Customers can specify a shipping method and destination for up to 10 delivery groups per order by default.

Split shipping doesn't work with legacy checkout components. If you haven't updated your Checkout page with the latest components, see [Set Up the Checkout Page](#) on page 259.

1. Enable split shipping.
 - a. From the Setup menu on your store's home page, click **Developer Console**.
 - b. From Debug, click **Open Execute Anonymous Window**.
An Apex editor window opens.
 - c. Copy this code snippet into the Apex editor window.

```
ID storeId = '0ZExx0000000000000000'; // !! REPLACE WITH YOUR STORE ID !!

WebStore store = [ select id, OptionsSplitShipmentEnabled FROM WebStore WHERE id =
:storeId LIMIT 1];
store.OptionsSplitShipmentEnabled = true;
update store;
```

- d. Replace the store ID with your 18-character ID.
You can find your ID in your store's home page URL. It begins with "webStoreId=".



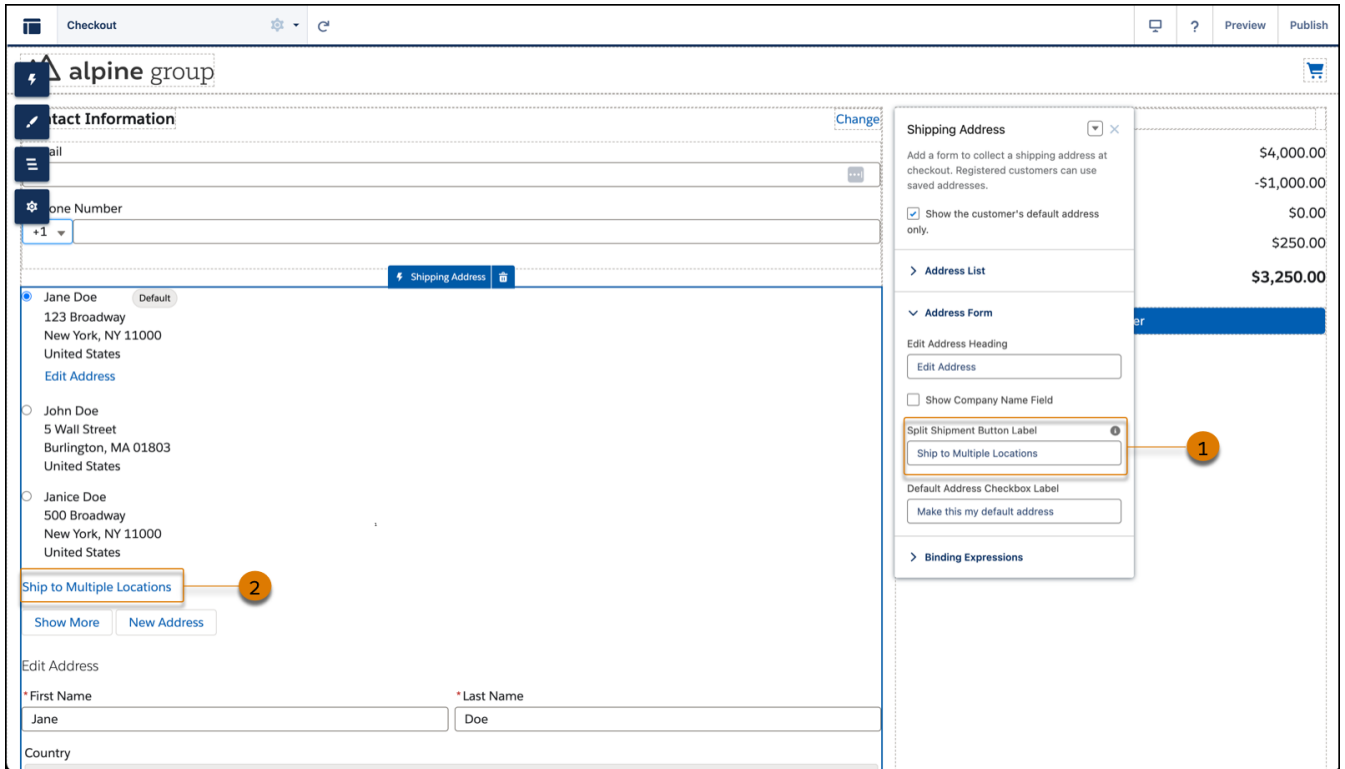
- e. Execute the code, and return to your store's home page.
2. In Experience Builder, go to the Checkout page to customize the split shipping button.
To change the button name, edit the Shipping Address component (1). If you don't see the Ship to Multiple Locations button (2) in the Shipping Address component, refresh the page. If you still don't see it, remove the Shipping Address component and then add it back to your page.
For guest users, the Ship to Multiple Locations button appears after the user enters an address. For registered users, the button appears automatically because their default address is saved.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce



3. On the Split Shipment page, add the Split Shipping Header and Cart Item components and customize them as needed. The Ship to Multiple Locations button opens the Split Shipment page where customers can split the cart items and add the delivery addresses.
4. Preview and publish your changes.
5. If your store was created before the Spring' 24 release, update your store's shipping integration Apex class. However, before implementing this change, consult with your developer so that you don't overwrite any custom modifications made to this class.
 - a. From Setup, in the Quick Find box, enter *Apex Classes*, and then select **Apex Classes**.
 - b. Find the B2CDeliverySample class, and click **Edit**.
 - c. From GitHub, copy the code from the B2CDeliverySample.cls code block.

<https://github.com/forcedotcom/commerce-on-lightning/blob/develop/examples/b2c/checkout/integrations/classes/B2CDeliverySample.cls>
 - d. Paste the code into your org's B2CDeliverySample Apex Class window.
 - e. Save your changes.

(Optional) To increase the delivery group limit for your Salesforce org, contact your Salesforce Administrator.

SEE ALSO:

- [Customize Shipping in Checkout](#)
- [Set Up the Checkout Page](#)
- [Define Apex Classes](#)

Profile Menu

Configure the Profile Menu component to tailor the way guests and authorized buyers log in to your store and navigate to their account information and order history.

[Customize the Profile Menu](#)

Define how you want your user profile menu to appear, including using company names and logos.

[Create a Buyer Manager Profile Menu for B2B Stores](#)

You might not want buyers to have access to the same user profile menu items as your buyer managers. You can create a separate user profile menu for buyer managers and edit the default profile to apply just to buyers.

[Customize the Address Form Page](#)

As an admin, you can customize a store's Address Form page for B2B and B2C stores.

[Customize the Address List Page](#)

As an admin, you can customize a store's Address List page for B2B and B2C stores.

Customize the Profile Menu

Define how you want your user profile menu to appear, including using company names and logos.

1. Go to Experience Builder.
2. In the store header, click the **Profile Menu** component.
In B2B stores created with the Aura template, it's called the Customizable User Profile Menu component.
3. From the Authenticated User Options dropdown, select **Edit Default User Profile Menu**.
4. Customize the user profile menu.
 - Select a menu item to edit its properties.
 - Drag menu items to reorder them.
 - To add a menu item, click **+Add Menu Item** and set its name, type, and other properties.
 - To delete a menu item, click the X next to its name.

SEE ALSO:

[Profile Menu](#)

Create a Buyer Manager Profile Menu for B2B Stores

You might not want buyers to have access to the same user profile menu items as your buyer managers. You can create a separate user profile menu for buyer managers and edit the default profile to apply just to buyers.

1. Navigate to Experience Builder.
2. Under Settings, click **Navigation**.
3. Click **Add Navigation Menu**.
4. Add a name and the menu items, and then click **Save Menu**.
5. In the store header, click **Profile Menu**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce and D2C Commerce

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce

In B2B stores created with the Aura template, the component is called Customizable User Profile Menu component.

- From the Authenticated User Options dropdown, select **Edit Default User Profile Menu**.
- Remove the menu items that you don't want buyers to see, and click **Save Menu**.
- Click **Personalize**, and assign the buyer manager profile menu to the buyer manager audience.

SEE ALSO:

[Profile Menu](#)

Customize the Address Form Page

As an admin, you can customize a store's Address Form page for B2B and B2C stores.

- Open Experience Builder, and select the **Address Form** page.
- To view the Address Form page properties, click the page.
- Make your changes.

If you select **Show all address types**, buyers and shoppers can add or edit their shipping and billing addresses. When deselected, buyers and shoppers can add or edit only their shipping address. For B2B stores, the option is selected by default. For B2C stores, the option is deselected by default. Make sure that the setting matches the Show Address Type setting in the Address List page.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

Customize the Address List Page

As an admin, you can customize a store's Address List page for B2B and B2C stores.

- Open Experience Builder, and select the **Address List** page.
- To view the Address Form List properties, click the page.
- Make your changes.

By default, Show Address Type is set to Shipping and billing for B2C stores, and to Shipping for B2B stores. When you select shipping and billing, make sure that **Show all address types** is selected in the Address Form page.

EDITIONS


Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

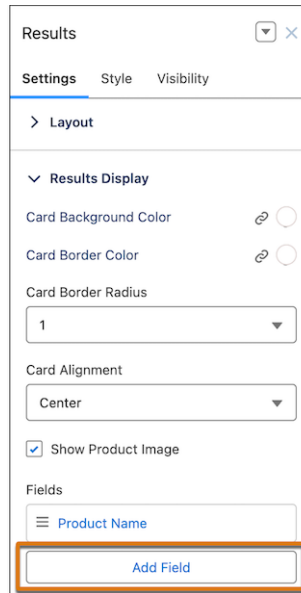
Configure Displayable Product Fields

Displayable product fields allow your store to retrieve product data faster on product, cart, and checkout pages. Select product fields that you want to make visible to customers and add them as displayable fields. Showing only the fields needed improves performance and makes the information more accessible to shoppers. Six fields are always selected by default for new orgs and additional fields are selected as needed.


 **Important:** To improve page performance, you must add all product fields that are used in the UI as displayable fields.

- On your store's home page, click the **Administration** tile.
- Click **Displayable Fields**.
- Click **Manage Fields** to add or remove the field.
- Click **Save**.

- To set up the fields in your store, open the search page in Experience Builder.
- From the Results component, click **Add Field**.



- To edit the field, click the field name. You can change the field, text size, and text color. Click **Save** and publish your store.

 **Note:** After this step, the fields are now visible to customers. However, in order for improvement to be seen in page performance, the displayable product fields feature still must be enabled.

- From Commerce Setup, go to **Product Setup > Displayable Product Fields**.
- Turn on the displayable product fields feature toggle.
- Rebuild the search index. See [Rebuild the Search Index](#).

SEE ALSO:

[Mark Product Fields as Searchable](#)

Buyer's Lists for B2B Aura Stores

If you have a B2B store created with the Aura template, buyers can keep personal lists of products. Buyers can use lists in any way they like. For example, they can use lists to track past purchases, remind themselves of interesting products, and gather products for future purchase. A buyer can have up to 10 lists, and each list can contain up to 500 products.

[Add Fields to Buyer's Lists for B2B Aura Stores](#)

In a buyer's list, each item shows the same default product data. To show more product information, you can add up to three more fields.

[Remove Lists from Your B2B Aura Store](#)

If you don't want to offer buyers the option to create personal lists, you can remove the list feature from your store.

Add Fields to Buyer's Lists for B2B Aura Stores

In a buyer's list, each item shows the same default product data. To show more product information, you can add up to three more fields.

Buyers lists are available in B2B stores created with the Aura template.

1. In Experience Builder, open the My Lists page, and select the **My Lists** component.
2. In the property editor, expand the Product Data section, and click **Add Field**.
3. Click the field name.
4. In the Edit Field window, select the field to add.
5. Optionally, in the Display Name field, enter the field name to show to customers.
6. To add more fields, repeat this process.
7. Preview and publish your changes.

SEE ALSO:

[Buyer's Lists for B2B Aura Stores](#)

Remove Lists from Your B2B Aura Store

If you don't want to offer buyers the option to create personal lists, you can remove the list feature from your store.

Buyer lists are available in B2B stores created with the Aura template.

1. In Experience Builder, go to the Product Detail page, and select the **Product Detail Card** component.
2. In component properties, expand the Add to List Button section, and deselect **Show Add to List button**.
3. Open the Cart page, and select the **Cart** component.
4. In component properties, expand the Add All to List Button section, and deselect **Show Add All to List button**.
5. On any page, select the **Multilevel Navigation Menu** component, and in component properties, click **Edit Default Navigation**.
6. Remove the My Lists page from the navigation menu.
7. Preview and publish your changes.

SEE ALSO:

[Buyer's Lists for B2B Aura Stores](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions

Available in: B2B Commerce

Use Real Data to Customize the Order Summary Pages in B2B Aura

If you have a B2B store created with the Aura template, you can customize a store's order page or list of orders more effectively if you see real data in Experience Builder.

1. Get the record ID of the account with the order data that you want to view.
To get the Account record ID, navigate to the account, and copy the ID from the URL.
2. Open Experience Builder, and select the **Order Summary List** page.
3. To show Order List component properties, click the component.
4. In the Account ID field, enter the Account record ID.
The Order List component now shows all orders placed by that account.
5. (Optional) To view an order from that account, click **Preview** and select the order to preview.
6. Click **Back to Builder**, and customize the page with the selected list or order in view.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited,** and **Developer Editions**

Available in: B2B Commerce

Publication and Activation

When you've previewed your pages and are ready to start selling, it's time to make your store available to your customers. First, configure a custom domain and CDN. Assign the store a custom URL. Then publish the store and activate it.

[Configure a Custom Domain and CDN](#)

Production B2B and B2C stores must be associated with a custom domain that is configured to use the Salesforce content delivery network (CDN) hosted by Akamai. A CDN isn't required for sandbox stores, stores created in Developer Edition, or B2B stores created with an Aura template. A Salesforce admin typically configures the custom domain.

[Use a Custom URL for Your Store](#)

A store's URL is the default domain for digital experiences in your org, plus the path that you entered in the URL field when you created the store. For B2B and B2C stores created with an LWR template, you can't use the default URL. Instead, you assign a custom URL. The custom URL must be associated with a custom domain that uses the Salesforce CDN. For B2B stores created with an Aura template, a custom URL is optional, but we recommend a custom domain and corresponding CDN if broad access and high security are required.

[Publish Your Store](#)

As you work on your B2B or B2C store, you can preview what it looks like to customers. When you're ready to make it public, you publish the store and then activate it. You also republish your store whenever you make changes.

[Activate Your Store](#)

Activating your B2B or B2C store makes it available to customers and accessible to external services and online search engines. If you don't activate your store, customers can't self-register.

[Deactivate Your Store](#)

Deactivating your store makes it inaccessible to customers. Deactivate only when you want to temporarily or permanently bring down the store.


[Disable the Welcome Email for Your Store](#)

When you activate your store, all members of the site receive a welcome email. You can turn off this feature before you activate so that the email isn't sent.

Configure a Custom Domain and CDN

Production B2B and B2C stores must be associated with a custom domain that is configured to use the Salesforce content delivery network (CDN) hosted by Akamai. A CDN isn't required for sandbox stores, stores created in Developer Edition, or B2B stores created with an Aura template. A Salesforce admin typically configures the custom domain.

In production, you can associate the custom domain of a Commerce store with only one site. For troubleshooting information, see [Common Single Domain Certification Errors when Using Direct-to-Consumer LWR Sites](#).

 **Note:** Although a custom domain and corresponding CDN are optional for a B2B store created with an Aura template, 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.

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.

SEE ALSO:

[Use a Custom URL for Your Store](#)

[Activate Your Store](#)

Use a Custom URL for Your Store

A store's URL is the default domain for digital experiences in your org, plus the path that you entered in the URL field when you created the store. For B2B and B2C stores created with an LWR template, you can't use the default URL. Instead, you assign a custom URL. The custom URL must be associated with a custom domain that uses the Salesforce CDN. For B2B stores created with an Aura template, a custom URL is optional, but we recommend a custom domain and corresponding CDN if broad access and high security are required.

This task assumes that a Salesforce admin has already configured a custom domain that uses the Salesforce CDN. See [Configure a Custom Domain and CDN](#).

1. From Setup, in the Quick Find box, enter *Custom URLs*, and select **Custom URLs**.
2. Click **New Custom URL**.
3. For Domain, search for and select the custom domain.
4. For Site, search for and select your store.
5. For Path, enter the path to append to the custom domain to access your store.
6. Click **Save**.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited,** and **Developer Editions**


Available in: B2B Commerce and D2C Commerce

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited,** and **Developer Editions**

Available in: B2B Commerce and D2C Commerce

 **Note:** The URL for your store is a combination of the custom domain name and path. For example, if your custom domain is mydomain and you enter *vintagejewelry* for the path, the URL to your store is `www.mydomain.com/vintagejewelry`.

SEE ALSO:

[Publication and Activation](#)

[Configure a Custom Domain and CDN](#)

Publish Your Store

As you work on your B2B or B2C store, you can preview what it looks like to customers. When you're ready to make it public, you publish the store and then activate it. You also republish your store whenever you make changes.

1. On your store's home page, click **Experience Builder**.
2. To see how the store looks, click **Preview** in the upper-right corner of any page.
For more information, see [Preview Your Experience Builder Site](#).
3. When you like the way your store looks, click **Publish**.
Your store isn't available to buyers or shoppers until you activate it. After you activate your store, republish it whenever you make changes.
You get an email notification when your store is published.

SEE ALSO:

[Publication and Activation](#)

Activate Your Store

Activating your B2B or B2C store makes it available to customers and accessible to external services and online search engines. If you don't activate your store, customers can't self-register.

1. On your store page in Salesforce, click the **Administration** tile.
2. Click **Store Activation**.
3. Review the Before You Activate a Store section, and complete the remaining steps as needed. Here are some key things to consider.
 - Before you can activate a B2B or B2C store built with an LWR template, a Salesforce admin configures the custom domain that uses the Salesforce CDN. You then assign a custom URL that uses that custom domain to the store. See [Configure a Custom Domain and CDN](#) on page 268 and [Use a Custom URL for Your Store](#) on page 268.
 - We recommend that you use the Digital Experiences app to change the domain for the public channel associated with the store's CMS workspace. Make the domain match the domain that you configure for your store. For instructions on using the Digital Experiences app to configure the domain for a CMS public channel, see [Configure Salesforce CDN for Digital Experiences in Salesforce CMS](#).
 - Stores based on the LWR template accept only two-digit ISO codes for country and state or province. To minimize user entry errors, we recommend enabling state and country picklists, so that users select values from a list instead of typing them in. The

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited, and Developer Editions**

Available in: B2B Commerce and D2C Commerce

picklists ensure that two-digit ISO codes are used consistently throughout the entire organization. See [Enable and Disable State and Country/Territory Picklists](#).

- Make sure that your store tax type is correct. You can't change the tax type after you activate the store. The default tax type for B2B and B2C stores is net, which means product prices don't include taxes. See [Configure Store Language, Currency, and Tax](#) on page 214.
- When you activate your site, new members receive a welcome email. You can disable the welcome email before activating your store. See [Disable the Welcome Email](#) on page 270.

4. Click **Activate**.

SEE ALSO:

[Disable the Welcome Email for Your Store](#)

[Deactivate Your Store](#)

[Publication and Activation](#)

[Configure a Custom Domain and CDN](#)

[Use a Custom URL for Your Store](#)

[Configure Store Language, Currency, and Tax](#)

Deactivate Your Store

Deactivating your store makes it inaccessible to customers. Deactivate only when you want to temporarily or permanently bring down the store.

1. On your store page in Salesforce, click the **Administration** tile.
2. Click **Store Activation**.
3. Click **Deactivate**.

SEE ALSO:

[Activate Your Store](#)

[Publication and Activation](#)

Disable the Welcome Email for Your Store

When you activate your store, all members of the site receive a welcome email. You can turn off this feature before you activate so that the email isn't sent.

1. From Setup, in the Quick Find box, enter *Feature Settings*, and select **Feature Settings**.
2. Go to **Digital Experiences > All Sites**.
3. For your store, click **Workspaces**.
4. Click the Administration tile.
5. Click **Emails**.
6. Deselect **Send welcome email**.

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited,** and **Developer** Editions

Available in: B2B Commerce or D2C Commerce

EDITIONS

Available in: Lightning Experience and Salesforce mobile app

Available in: **Enterprise, Unlimited,** and **Developer** Editions

Available in: B2B Commerce and D2C Commerce

7. Save your changes.

SEE ALSO:

[Publication and Activation](#)

INDEX

B

B2B Commerce [22](#), [28](#)

L

Lightning B2B Commerce [25](#)