



Streamline Mass Reorders

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STREAMLINE MASS REORDERS

Provide a seamless reorder experience using the negotiated Sales Agreement object in an industry cloud, such as Manufacturing Cloud or Consumer Goods Cloud.



Get Started



Take Trailhead modules related to this solution.

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

Customer expectations during the 4th Industrial Revolution (4IR) are shifting dramatically. The experience a company provides is as important as its products and services.

This solution kit describes cross-channel collaboration from your sales representatives to Salesforce CPQ. Connect B2B Commerce storefronts with industry clouds to provide fluid interactions and optimize revenue streams.

This solution kit helps you:

- Use the Sales Agreement object in an industry cloud to easily reorder products and services.
- Integrate customer carts from B2B Commerce to CPQ for the sales rep to finalize and create complex quotes with customers interacting from the storefront.
- Send quotes back to the cart for the customer to purchase or complete from CPQ.

Required Products

- B2B Commerce Cloud
- Industry Cloud such as Manufacturing Cloud, Consumer Goods Cloud, or other cloud

- [Salesforce CPQ](#)
- [B2B Commerce Cloud and CPQ Connector](#)

Implement This Solution

[Workflow](#)

Learn how data flows through the configurations when you streamline mass reorders.

[Design Considerations](#)

Keep these design considerations in mind when you streamline mass reorders.

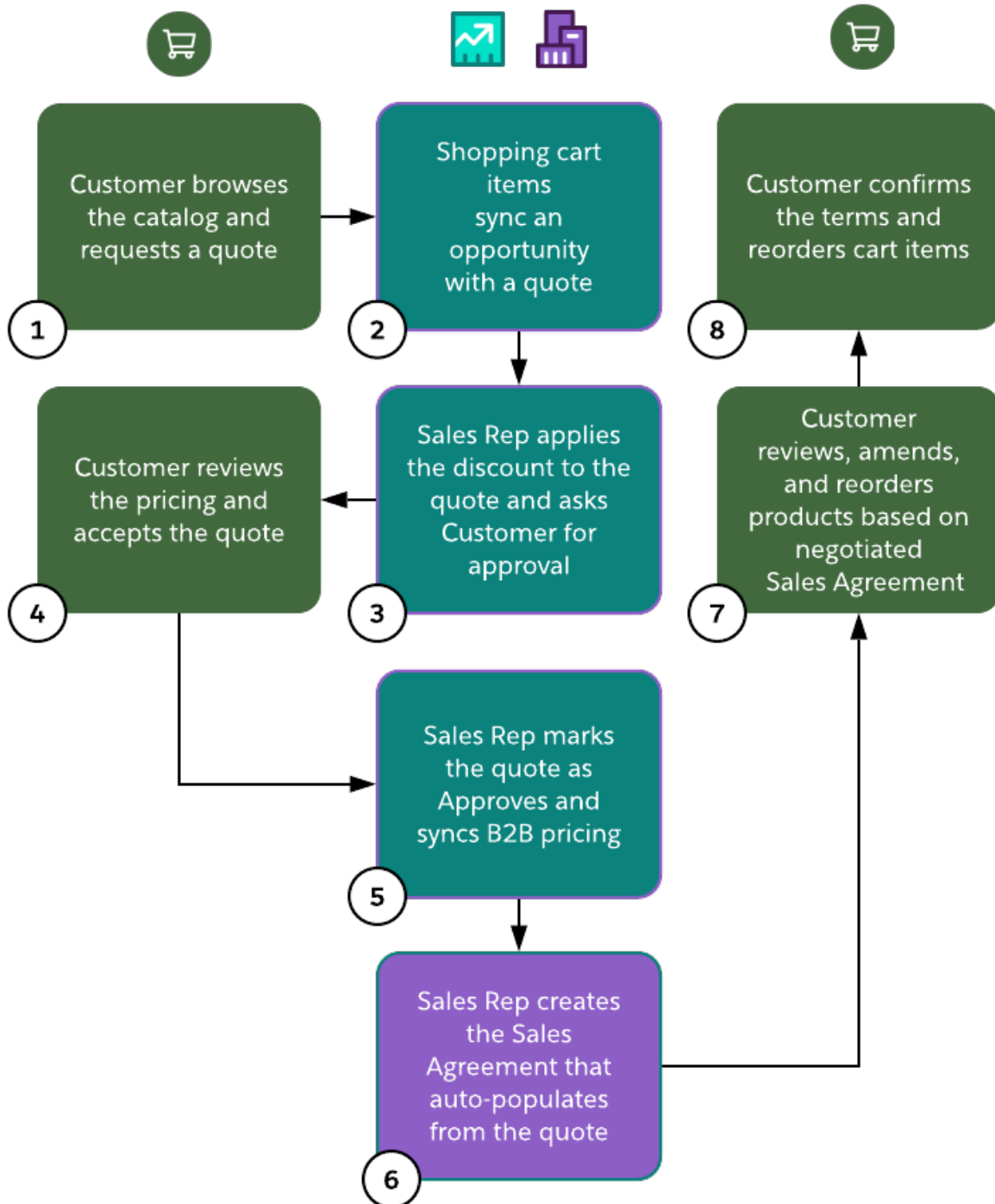
[Configurations](#)

Use these configurations to streamline mass reorders.

Workflow

Learn how data flows through the configurations when you streamline mass reorders.

Workflow



Related Content



Take the next steps in this implementation.

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- [Configurations](#) on page 6

Design Considerations

Keep these design considerations in mind when you streamline mass reorders.

Identify the scope and requirements.

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

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

Monitor error logs, and subscribe to reports.

- Assign ownership for bugs and issue tracking with a service-level agreement (SLA) across system, functional, and business analyses. Monitor error logs between tools.

Validate your data strategy when adding to user stories and business processes.

- Refer to the product and price master data flow and design considerations for Enterprise Resource Planning (ERP). This solution kit assumes that you use the product CPQ master approach.

Key Considerations

Data from the Connector

- Storefront and connector orders create opportunities.
- Carts that generate quotes and quotes that generate carts don't require an opportunity record.

Cart-to-Quote Requests

- Request Quote runs at any time from the customer's cart or the B2B Commerce Order creation. Either way, CPQ makes a quote and then item data after the storefront makes a request.
- After Request a Quote initiation from an order, CPQ data populates in the following order:
 - Opportunity
 - Quote
 - Quote line items and order
 - Order items.

Limitations and Guardrails

Order Transfer to Storefront Cart

- A custom Lightning action on the quote page supports the action when a sales rep transfers a quote to a cart in the customer's view.

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

- Exclude cart quotes for any pricing rules or quote calculator plugin (QCP) overrides. The price published from cart to quote drives price overrides.

Performance and Scalability Considerations

Notifications

- Configure transactional alerts using the cart-to-quote or quote-to-cart notification preferences. Review out-of-the-box options within Salesforce for email delivery via Process Builder, Account Engagement (Pardot) with Sales Alerts (Salesforce Engage Alerts), or by Marketing Cloud. For more information, see [native notification options](#).

Monitor and Manage the Error

- Log Cart order and quote errors appear in the CPQB2B Log object.
- Create reports by setting up a custom report type. Monitor performance and swarm issues that negatively affect the customer shopping experience.
- Use permissions and security record ownership from connector transactions. If your Salesforce storefront supports unauthenticated shopping, it creates B2B Commerce Cart and B2B Commerce Order under the logged in Salesforce community user context or the anonymous user context.

Performance and Scalability Considerations

ERP Integrations

- This model allows the user to extend functionality to an ERP or any backend system for enhanced revenue recognition or fulfillment. When activated, the Order object is the trigger point when sending any order information to an external system. The Order object is also the entry point when updating any fulfillment-level details.
- Implement the Order-to-Cash (OTC) integration between Salesforce Billing and the underlying ERP. It's the single source of truth for orders, invoices, and payments (electronic) regardless of whether the transaction originated from B2B or CPQ.
- If ERP is the Product & Pricing Master, sync all Product & Pricing information to Salesforce CPQ. Expect the connector to push the data to B2B Commerce.



Note: Don't directly integrate B2B with the ERP. The functionality supported in the connector or the integrations assumes that CPQ is the source for publishing data to B2B Commerce.

- If the ERP is the target application for downstream order fulfillment, use the Order object as the exit and entry point from Salesforce.
- If you must link B2B Commerce with an industry cloud without CPQ's robust list of features, you can integrate the sales agreement to the appropriate B2B objects. Integrating the sales agreement significantly changes the data model and any related ERP integrations.

Notifications

- Configure transactional alerts through the cart-to-quote or quote-to-cart notification preferences. Review out-of-the-box options within Salesforce for email delivery via Process Builder, Account Engagement (Pardot) with Sales Alerts (Salesforce Engage Alerts), or by Marketing Cloud. For more information, see [native notification options](#).

Monitor and Manage the Error Log

Cart order and quote errors appear in the CPQB2B log object.

Create reports by setting up a custom report type. Monitor performance and swarm issues that negatively affect the customer shopping experience.

Permissions and Security

- Record ownership from connector transactions. If your Salesforce storefront supports unauthenticated shopping, it creates B2B Commerce Cart and B2B Commerce Order under the logged in Salesforce Community user context or the anonymous user context.

Related Content



Review earlier steps in this solution.

- [Workflow](#) on page 2



Take the next steps in this implementation.

- [Configurations](#) on page 6

See Also

- [B2B Commerce Data Model](#)
- [Service Agent Order on Behalf Flow](#)

Configurations

Use these configurations to streamline mass reorders.

These steps assume that you completed the product and pricing setup and reviewed or implemented quote to cart solutions. Synchronize products and price lists between B2B Commerce and CPQ.

To learn more, watch [Driving Seamless Experiences for Manufacturing Cloud, CPQ, and B2B Commerce](#)

Industry Cloud with a Quote to Sales Agreement Data Flow

1. Create the opportunity.
 - a. Stamp PriceBook based on the B2B Commerce Pricelist mapping associated with the B2B Commerce Cart.
2. Create the quote associated with the opportunity based on cart information.
 - a. Populate the account and contact on the quote based on cart information.
 - b. Stamp Cart Id on the quote.
 - c. Pass Bill To and Ship To details from the cart to the quote.
 - d. Create sales agreements from quotes with a custom Lightning action. Use a custom Apex class for your specific business requirements. Drag the Create Sales Agreement Lightning action onto your main Quote page layout.
3. Add Quote Lines to the quote based on the cart items.
 - a. Publish each cart item and B2B Commerce product mapped to Product2 on the quote line along with quantity.
 - b. Publish the pricing from the B2B Commerce Cart item.
4. If a sales representative is processing the transaction, you can stop here with no further integration steps.
5. To publish an approved quote back to the cart with the finalized price, use a custom Lightning action on the quote page.
 - a. Because the quote and quote lines refer to the cart and cart items, publish the finalized price back to the cart.
 - b. Publishing the finalized price allows the customer to complete the transaction using the published and negotiated price.
6. Publish pricing overrides using these fields on the quote lines:
 - a. Publish SBQQ__SpecialPrice__c from the cart item price after any discounts or coupons.

- b.** Set the SBQQ__SpecialPriceType__c value to Custom.
- 7.** Create the sales agreement.
 - a.** After approving the quote, sync the price back to B2B Commerce using the Sync To B2B field. To create a sales agreement that uses pricing and product information from the quote, click the Create Sales Agreement button. This action automatically creates product schedules based on the length of time provided.
 - b.** Drag the Amend Sales Agreement Lightning action to your main Sales Agreement page layout.
- 8.** Amend the sales agreements.
 - a.** If a customer wants to renegotiate their sales agreement price, use the Amend Sales Agreement Lightning action. This action clones the primary quote associated with the sales agreement.
 - b.** Drag the Is_SA_Active__c checkbox to your main Sales Agreement page layout.
 - c.** If the quote is linked to a sales agreement, add a validation rule that checks to prevent a quote from being deleted.

Review the B2B Commerce CPQ Connector setup.

Refer to other solution kits for detailed setup and solution considerations for other objects.

Related Content



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- [Design Considerations](#) on page 4