Facebook & Instagram Shopping

by CedCommerce Products Documentation

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1. Overview

About CedCommerce:

CedCommerce is a client-first eCommerce Solution Provider, catered to 30,000+ happy customers with more than 850 Products across 25+ countries.

Our contribution to the eCommerce industry over the years has positioned us among the world-class leaders, and a distinguished Business Partner with Meta, Google, Amazon, Walmart, HubSpot, Shopify, BigCommerce, and 50 other Global Brands.

Our constant efforts in facilitating best-of-class affordable eCommerce solutions and 24X7 customer live support services have been recognized 5 Times in a Row Under Deloitte Technology Fast 50.

We are a group of 800+ professionals who work round the clock with a motive to make eCommerce easier. And, through our rigorous teamwork, we are successfully able to attain 5 Star Ratings on Trustpilot, Capterra, and Shopify.

CedCommerce – Facebook & Instagram Shopping App:

CedCommerce's enterprise-class Facebook & Instagram Shopping App is designed to help Salesforce Merchants effortlessly sell across Meta Commerce Surfaces Facebook *Marketplace, Facebook Shops, and Instagram Shopping.*

With our app, you would be easily able to:

- Set up Facebook and Instagram Shops
- Connect through the Meta Commerce Manager and Leverage Facebook Business Extension (FBE) beneficial.
- Map your Salesforce Listings on Meta Product Catalogue
- Upload Products in Bulk as well as Profile-wise
- Synchronize Real-Time Product Status
- Ensure end-to-end customer support from a single point of contact

Our user guide will help you step-by-step from scratch for hassle-free onboarding on CedCommerce App, covering crucial portions of Salesforce, Facebook & Instagram.

2. Registration & Sign In on app

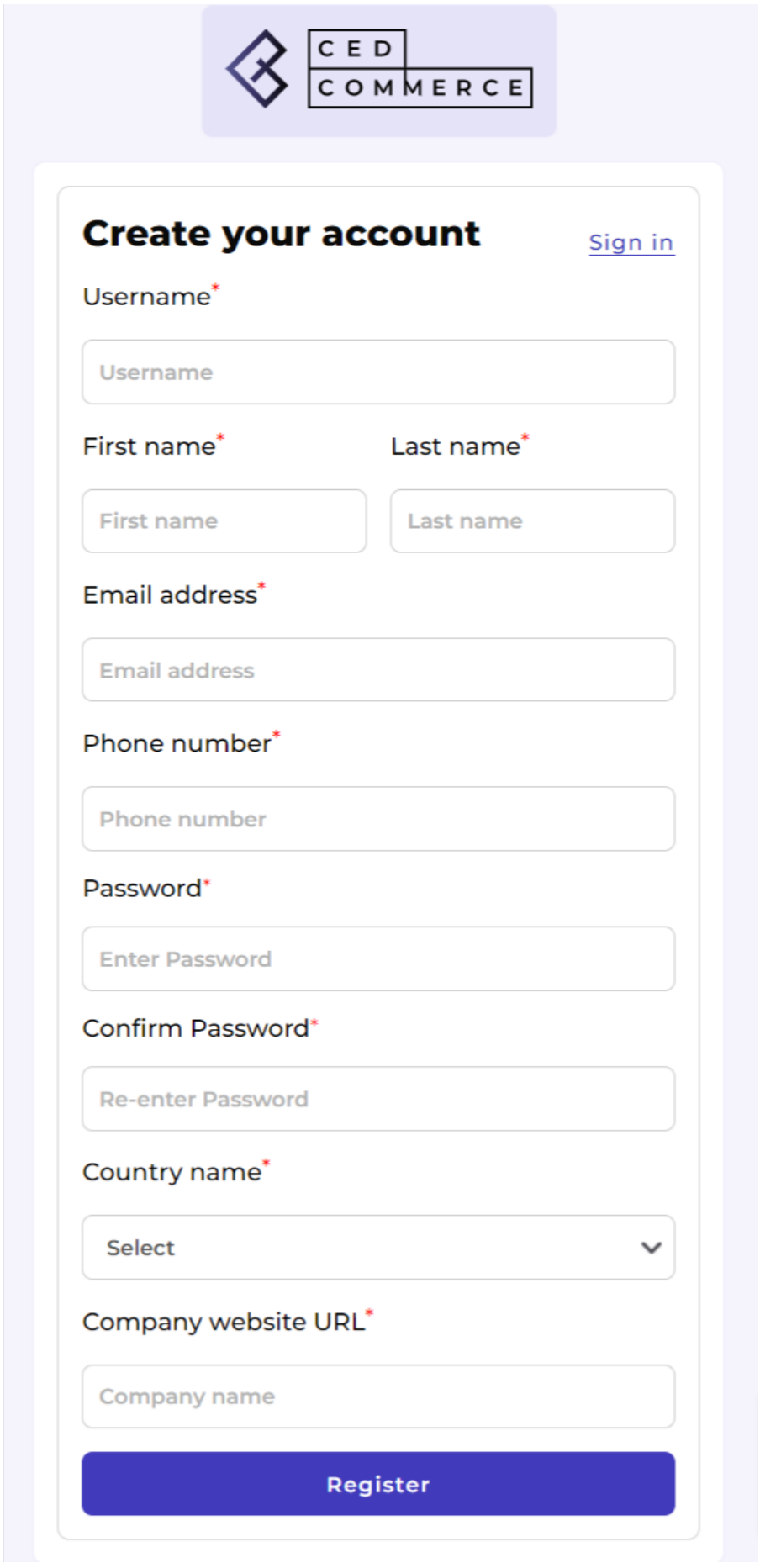
You can find the answers to the most important queries like:

- **How to Register on the app?**
- **How to Sign in on the app?**
- **How to Reset Forgotten Password on the app?**

2.1. Register on app

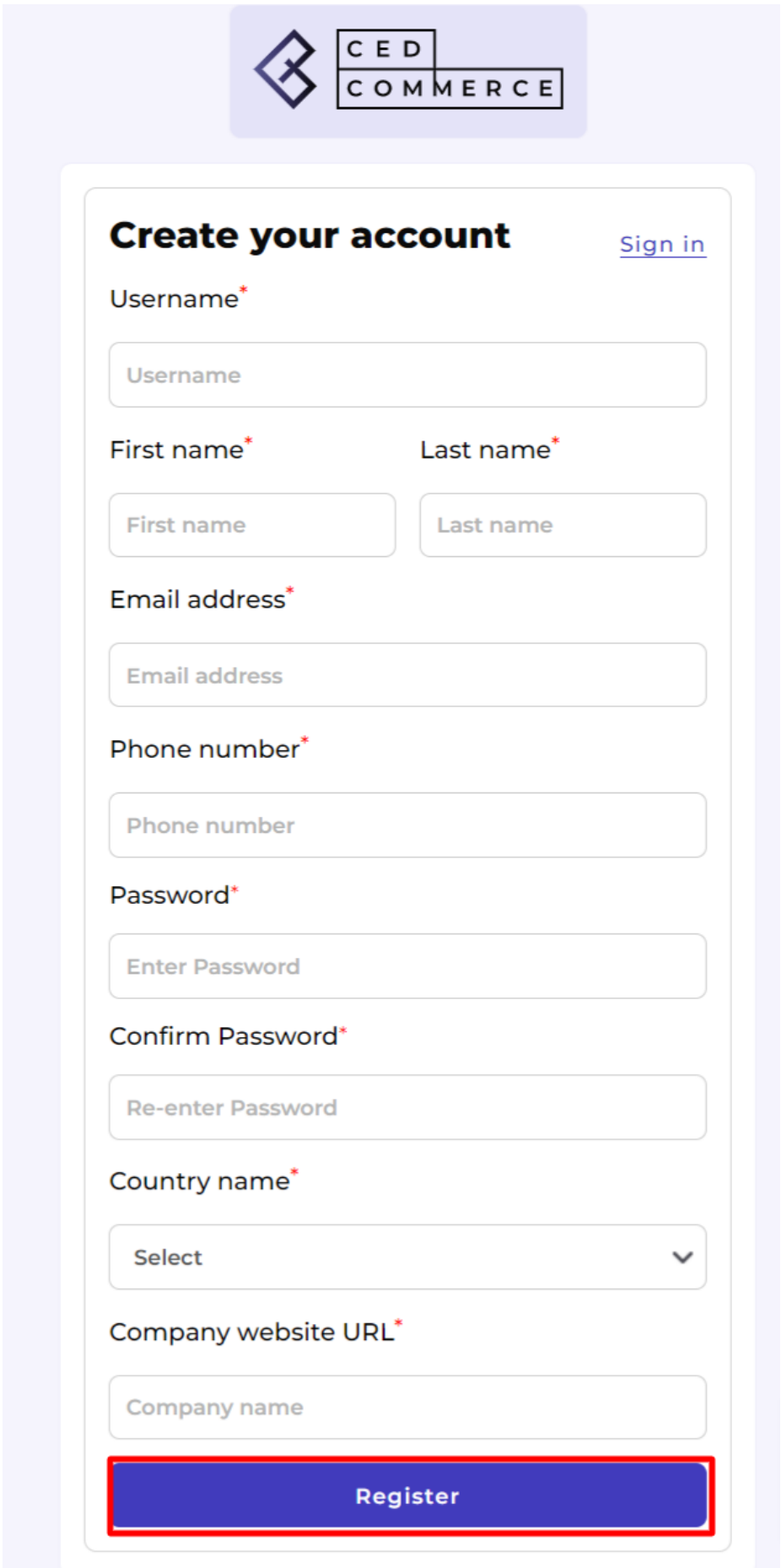
Register on CedCommerce

- You need to first **"Register"** yourself on CedCommerce. For this, please click here to visit the Sign Up Page. You will have the Registration Page as displayed below:


CED COMMERCE
Create your account
Sign in
Username*
Username
First name*
Last name*
First name
Last name
Email address*
Email address
Phone number*
Phone number
Password*
Enter Password
Confirm Password*
Re-enter Password
Country name*
Select
Company website URL*
Company name
Register

- Enter your **“Username”**, **“First name”**, **“Last name”**, **“Email address”**, **“Phone number”**, **“Password”**, **“Confirm Password”, “Company name”, and “Company website URL”**. Thereafter, click on the **“Register”** button. While registering you need to take care of the following points:
    - While entering the Username there should be **no spacing** in between them. For example, if your name is Ronald Patrick ? Enter your Username as “RonaldPatrick” instead of “Ronald Patrick”.
    - The password should be of a **minimum of 6 characters.** You are free to create the password as per your choice i.e. purely numeric or alphabetical or alphanumeric. For example, you can have passwords like Ronald@123456, Ronald1234, PatrickRonald, 879832, etc.

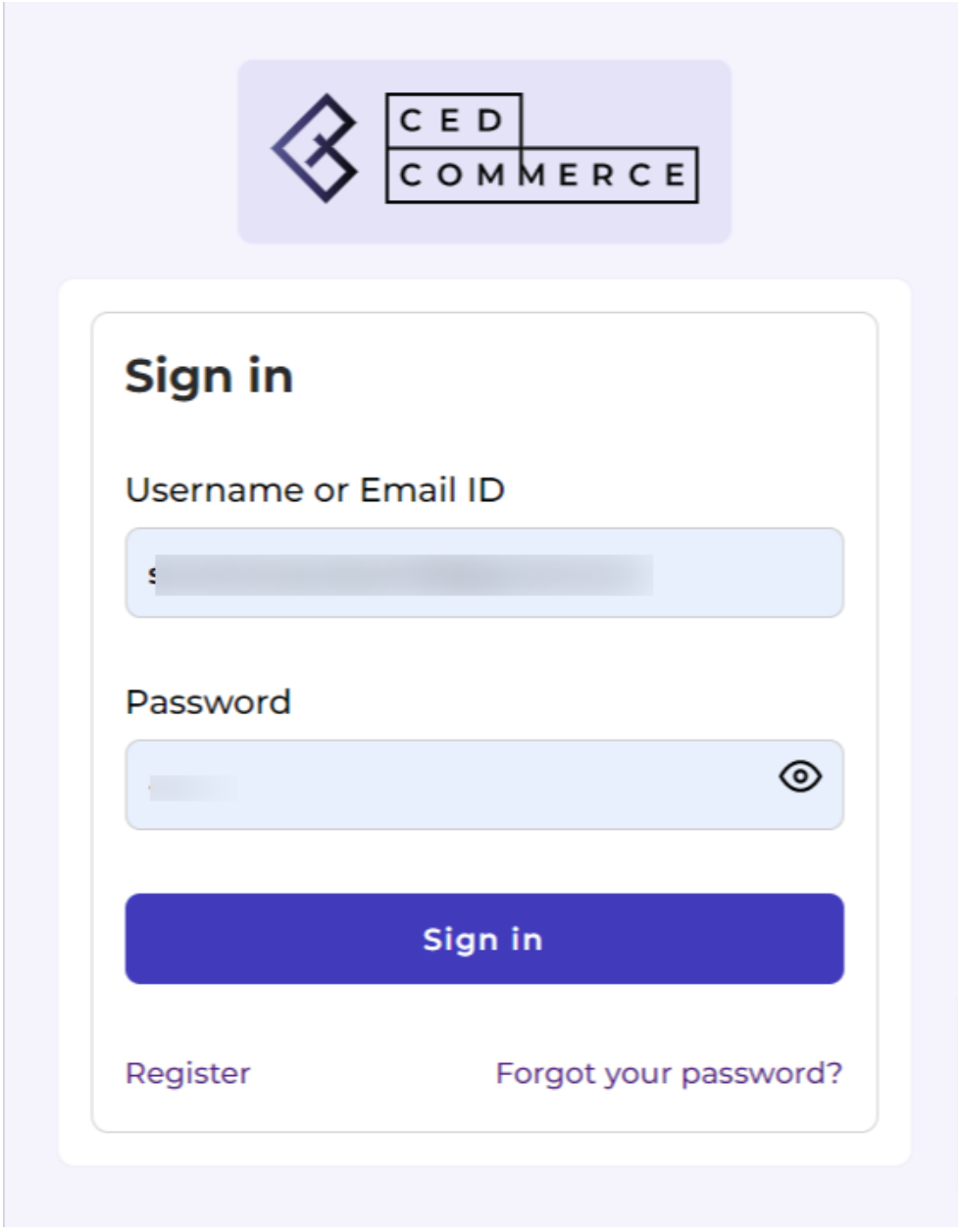
After successfully completing the registration process, you will be redirected to the Sign-in page.


CED COMMERCE
Create your account
Sign in
Username*
Username
First name*
Last name*
First name
Last name
Email address*
Email address
Phone number*
Phone number
Password*
Enter Password
Confirm Password*
Re-enter Password
Country name*
Select
Company website URL*
Company name
Register

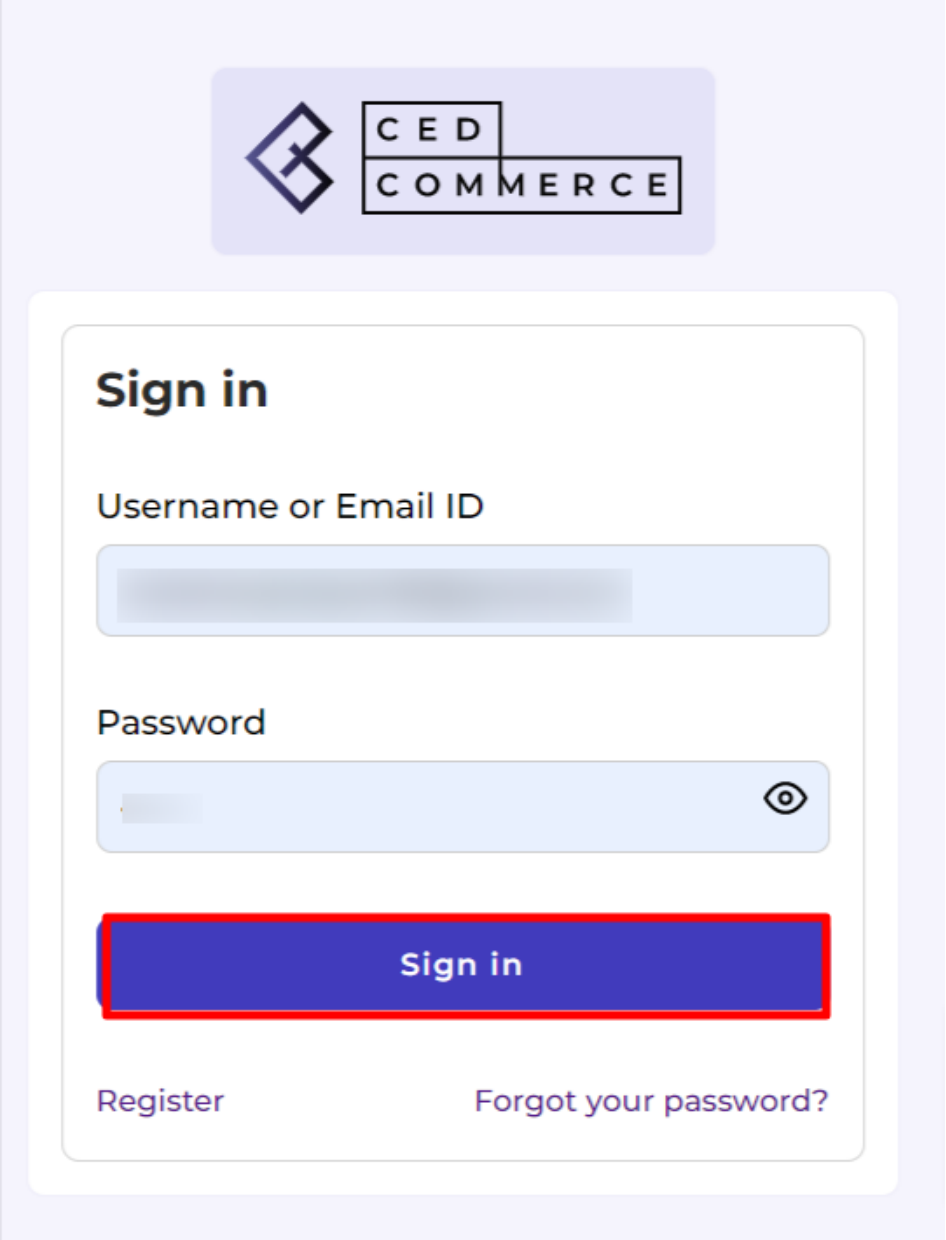
2.2. Sign in on App

Sign in on CedCommerce

- Moving ahead, you will be automatically redirected to the **Sign-in Page.**



- Enter the **“Username”** or **“Email ID”** and **“Password”** you created while registering in the previous step. Thereafter, click on **“Sign in”**.



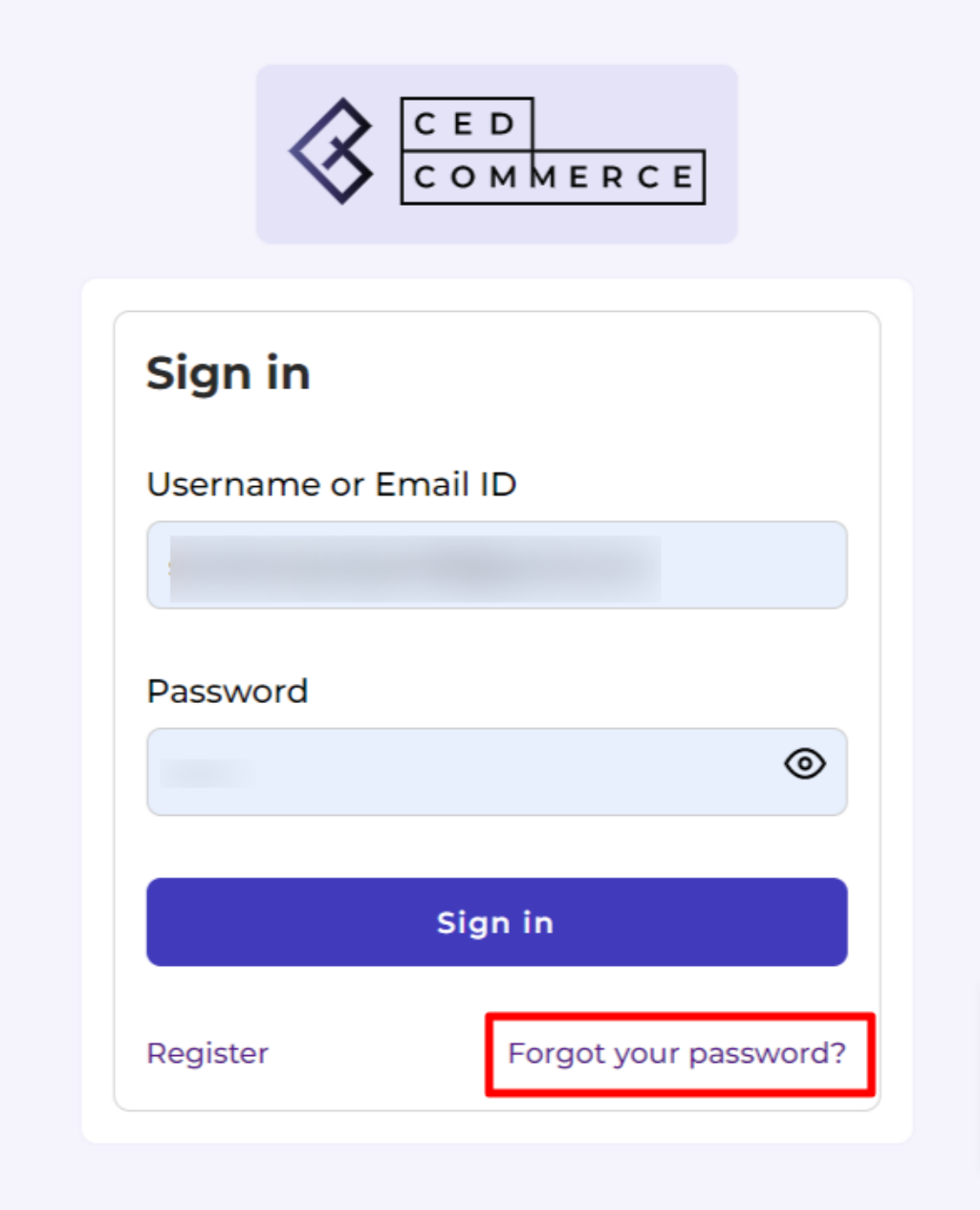
- Once you log in, you will be redirected to the “Integration Set-Up Section” where you need to **complete the following three mandatory steps:**
  - Authenticate your Salesforce Commerce Account Details on CedCommerce API
  - Connect your Facebook & Instagram Accounts on CedCommerce API
  - Configure Category and Attribute Mapping on CedCommerce API

  Let’s understand this in the upcoming sections.

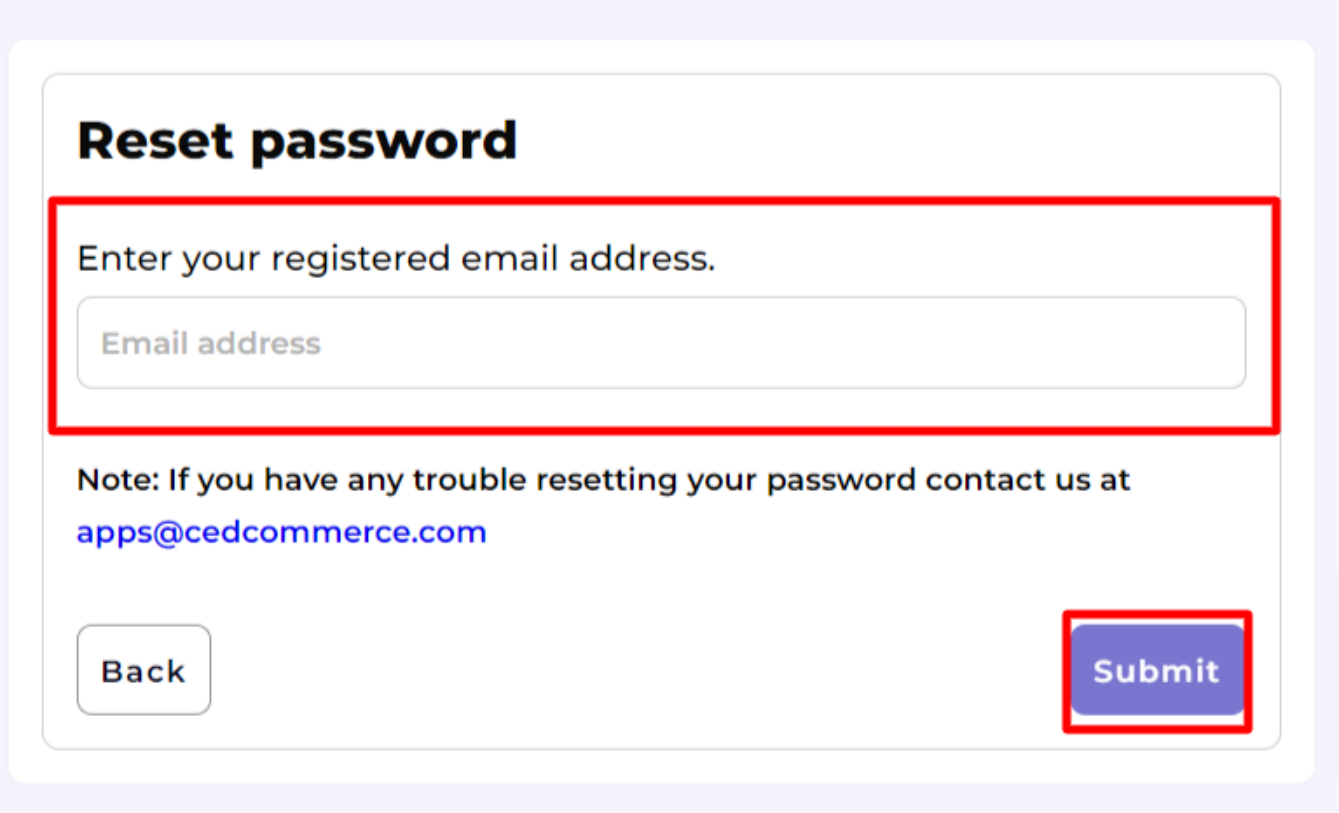
2.3. Reset Forgotten Password on app?

Reset Forgotten Password on CedCommerce

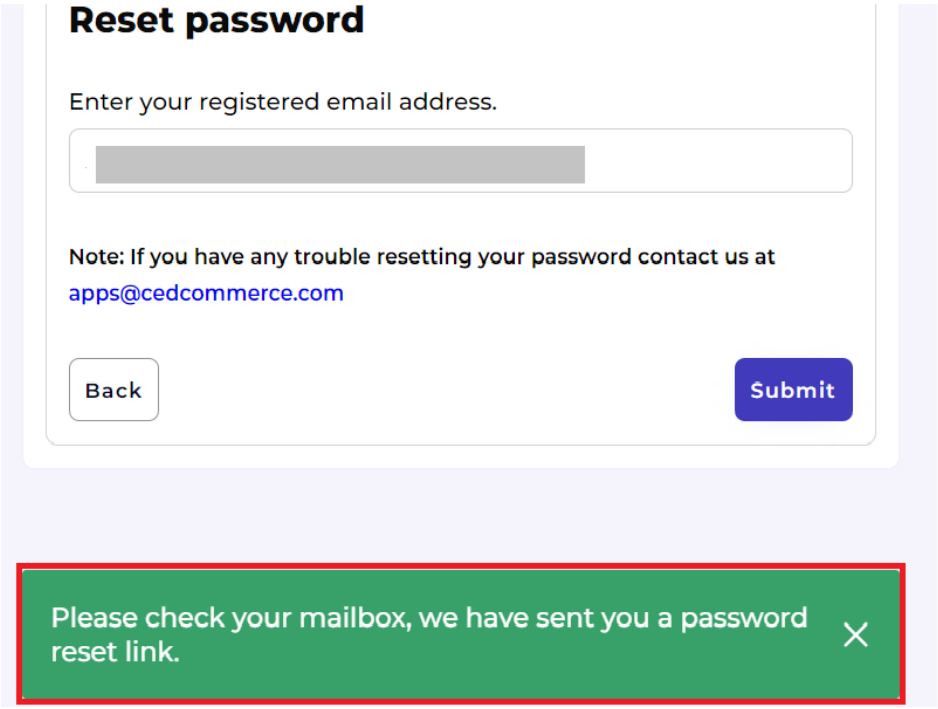
1. Click on the **“Forgot Password”** as displayed below.



1. Further, **“Enter your registered email address”** (which you used during the registration process on CedCommerce App) and click on the **“Submit”** button.



1. You will be prompted to message, **“Please check your mailbox, we have sent you a password reset link.”** Next, check your inbox and reset the password.



3. Onboarding Process

The onboarding process guides you through the important section and steps that need to be undertaken in order to connect your Salesforce account to the Meta Commerce platforms efficiently.

It consists of three necessary steps to authenticate your accounts, connect with Meta platforms, and map your product category to successfully leverage the app functions and sell seamlessly upon both platforms.

The Onboarding process is divided into the following three steps:

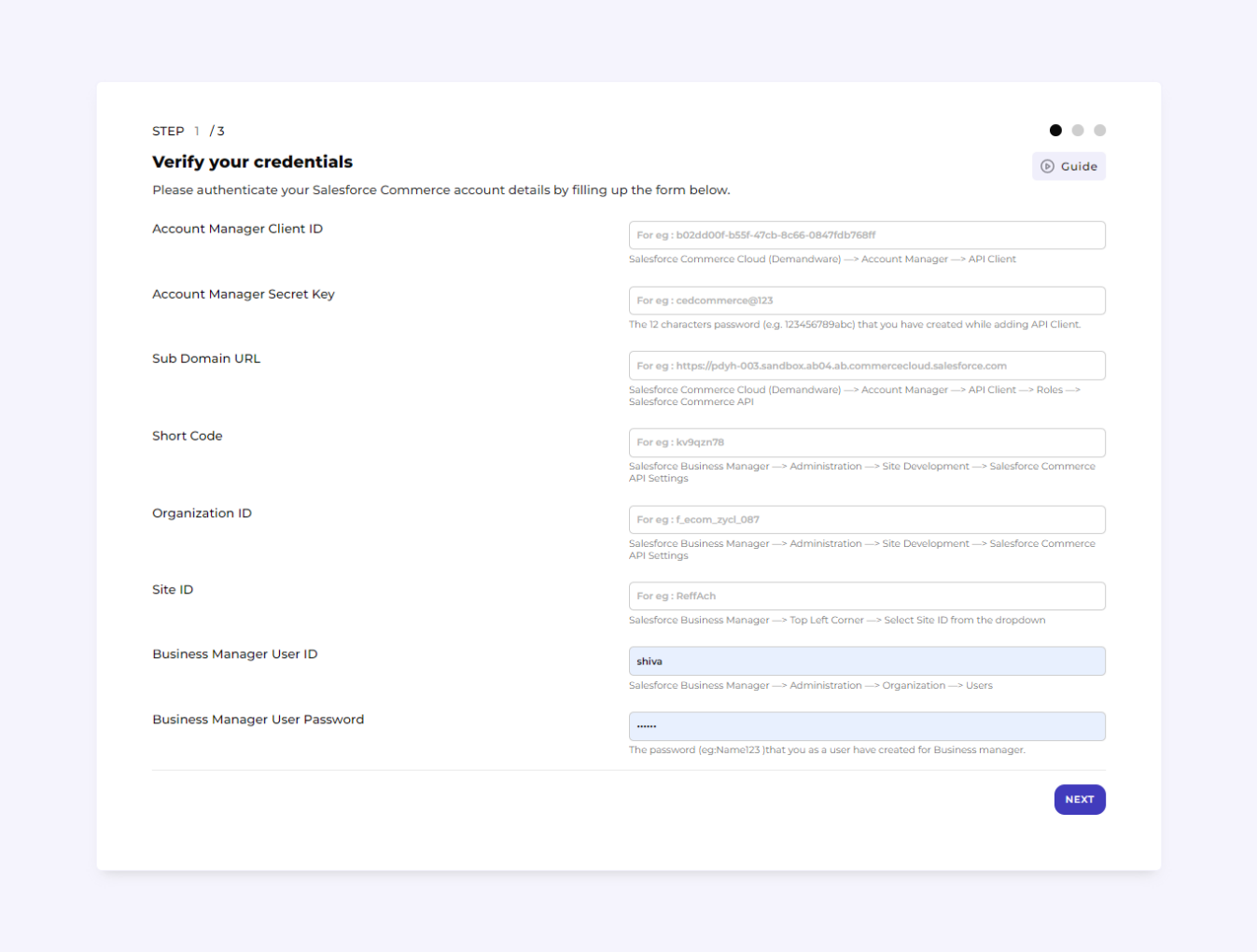
- **Authenticate your Salesforce Commerce Account Details on the app**
- **Connect Facebook Account with the app**
- **Configure Category and Attribute Mapping on the app**

3.1. Authenticate your Salesforce Commerce Account Details on app

After you are done with registration on CedCommerce API, you will get the “Verify your Credentials” Page as shown below.

Here you need to authenticate your following Salesforce Commerce Account details with CedCommerce.

- **Account Manager Client ID**
- **Account Manager Secret Key**
- **Sub Domain URL**
- **Short Code**
- **Organization ID**
- **Site ID**
- Business Manager User ID
- Business Manager User Password



Don’t worry; we will guide you on “how & from where” you’ll find all these data.

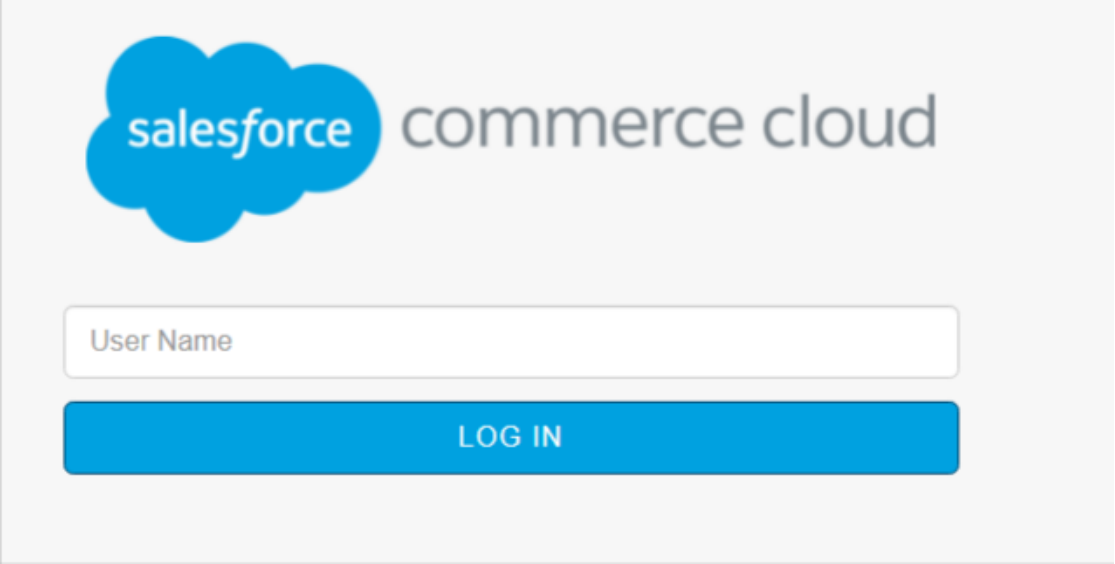
For this, you need to have access to:

Salesforce Commerce Cloud Account**: This** will give you the details of Account Manager Client ID, Account Manager Secret Key, and Sub Domain URL.

Salesforce Business Manager: This will give you the details of Short Code, Organization ID, and Site ID.

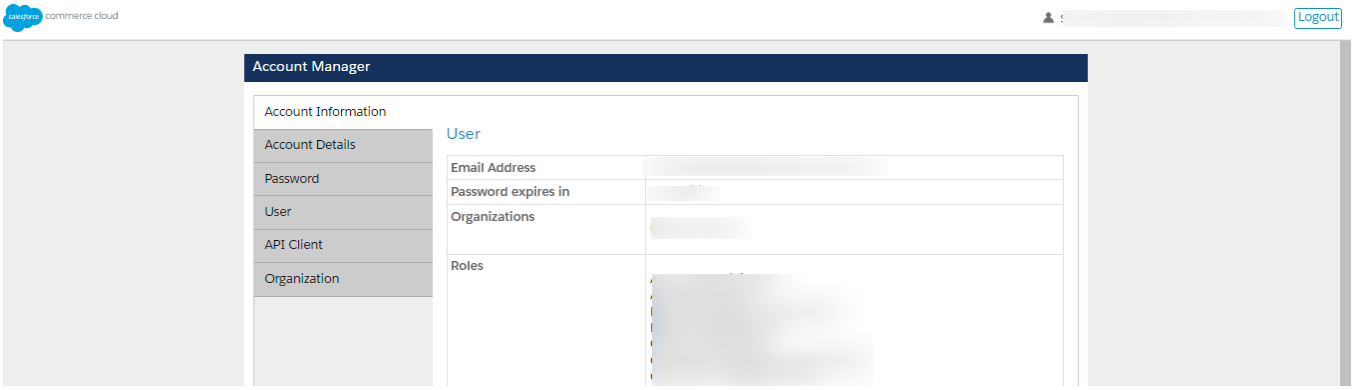
3.1.1. How to get Account Manager Client ID from Salesforce Commerce?

- Click here to log in to the Salesforce Commerce Cloud.

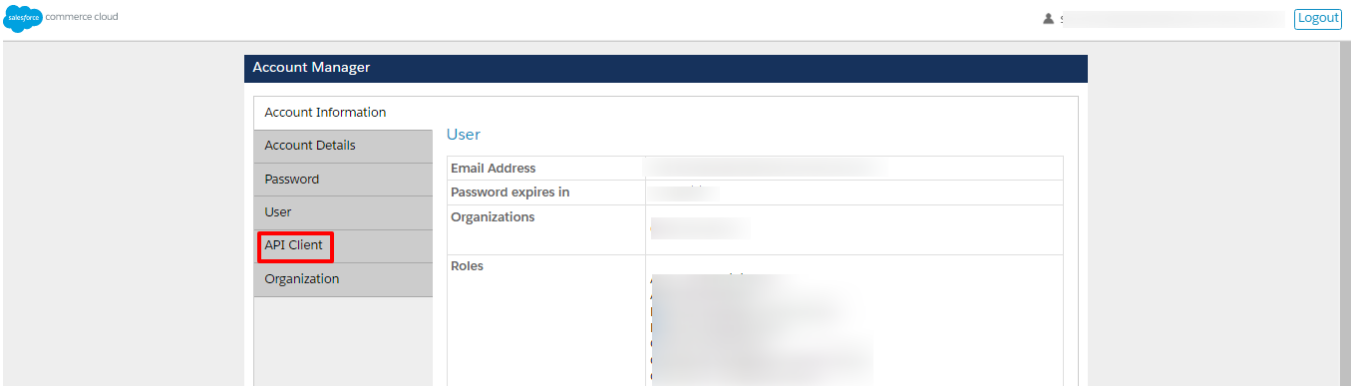


- Enter the email address you have registered on Salesforce Commerce Cloud and click on **“Login”**.

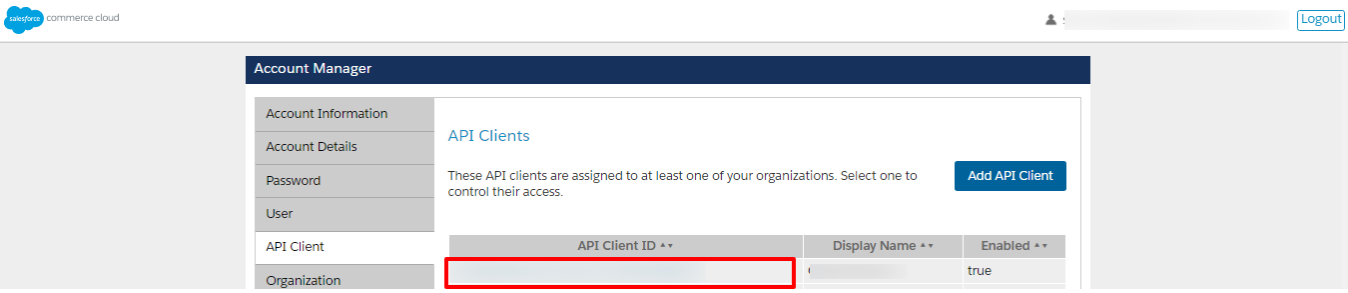
Further, you will be asked to enter your password and after successful login, you will be redirected to the Salesforce Commerce Cloud **Account Manager also known as Demandware,** as displayed below:



- Now click on **“API Client”** available on the Left Hand Side.



- Here, you will find the **API Client ID** which is your **Account Manager Client ID** that you need to fill in the **“Verify your credentials”** page – first field.



Note: In case, you are unable to find anything over here means it is blank. You need to **"Add API Client"** which has been guided under **How to configure API Client.**

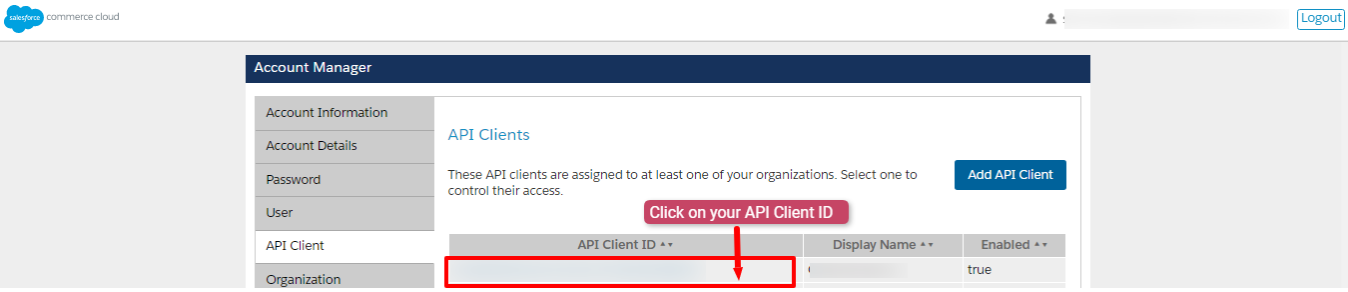
3.1.2. Get Account Manager Secret Key from Salesforce Commerce

The Account Manager Secret Key that you need to fill at the second field on the **"Verify your credentials"** page is the 12 characters password.

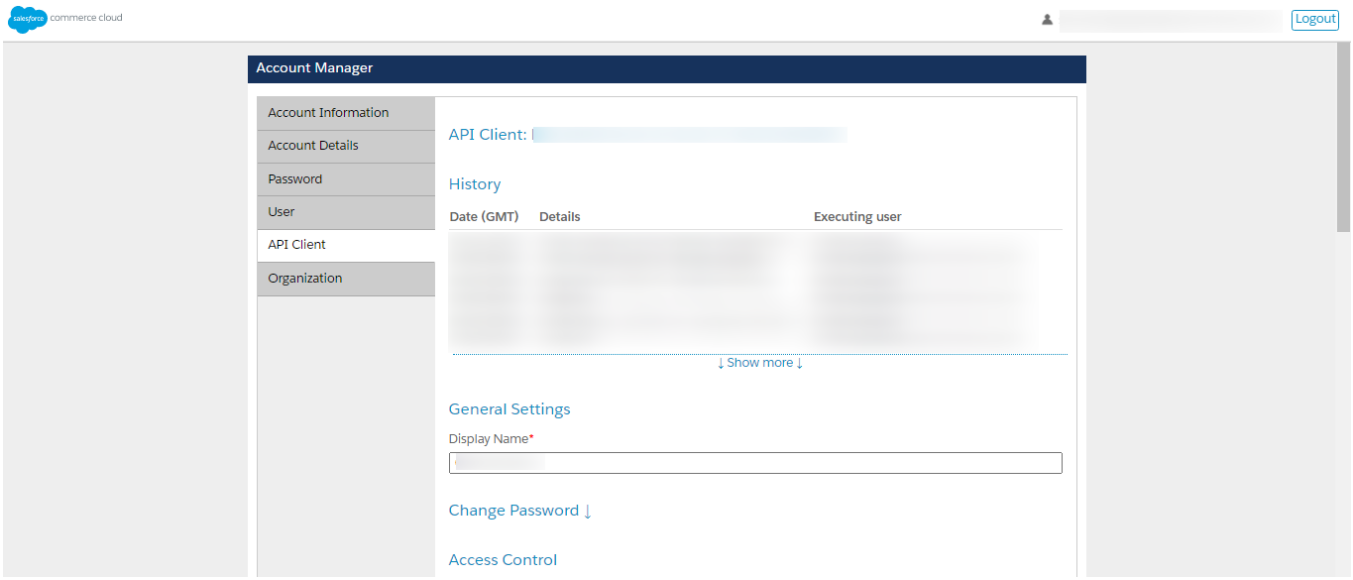
You need to provide the alphanumeric code containing the numbers & letters that you created while adding API Client — e.g. 123456789abc

3.1.3. Get Sub Domain URL from Salesforce Commerce

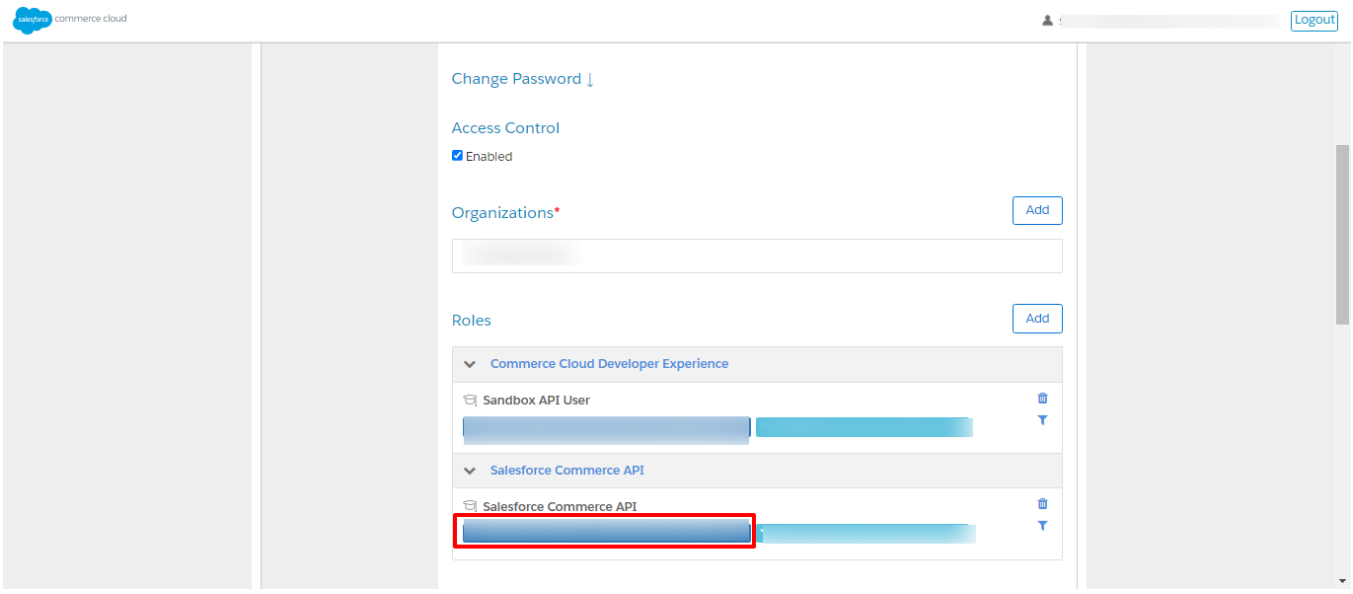
- Click on your **API Client ID.**



- You will be directed to the complete details of that particular API Client ID as displayed below:



- Scroll down on this same page and you will get **“Roles”** as displayed below.From here you can have the detail of the **Sub Domain URL**. The same you need to fill at **the third field on the “Verify your credentials”** Page.



- Copy the URL from the red section and **add https://** before the URL you have copied. **This is your final Sub Domain URL.** For example, https://zycl-001.sandbox.us01.dx.commercecloud.salesforce.com/

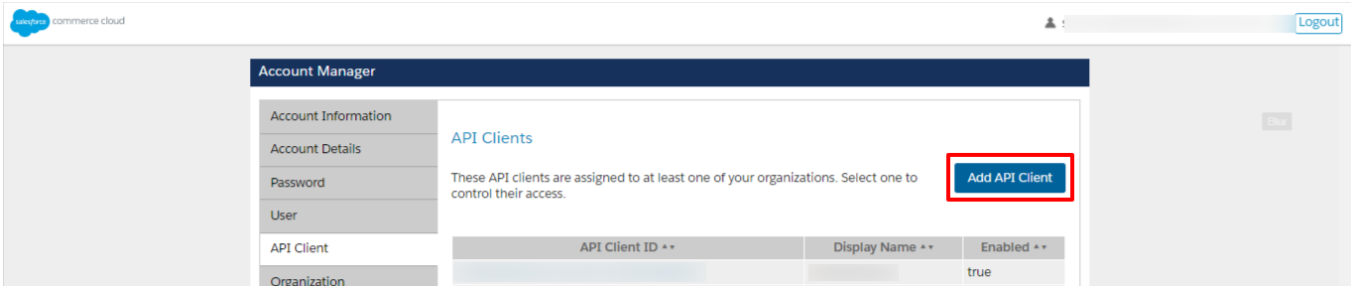
With this, you have successfully retrieved the first three fields of the **“Verify your credentials”** Page.

3.1.4. Configure API Client

This step is for those who haven’t created any API Client ID. Here we will go through the complete process on **How to Add API Client.**

Let’s proceed!

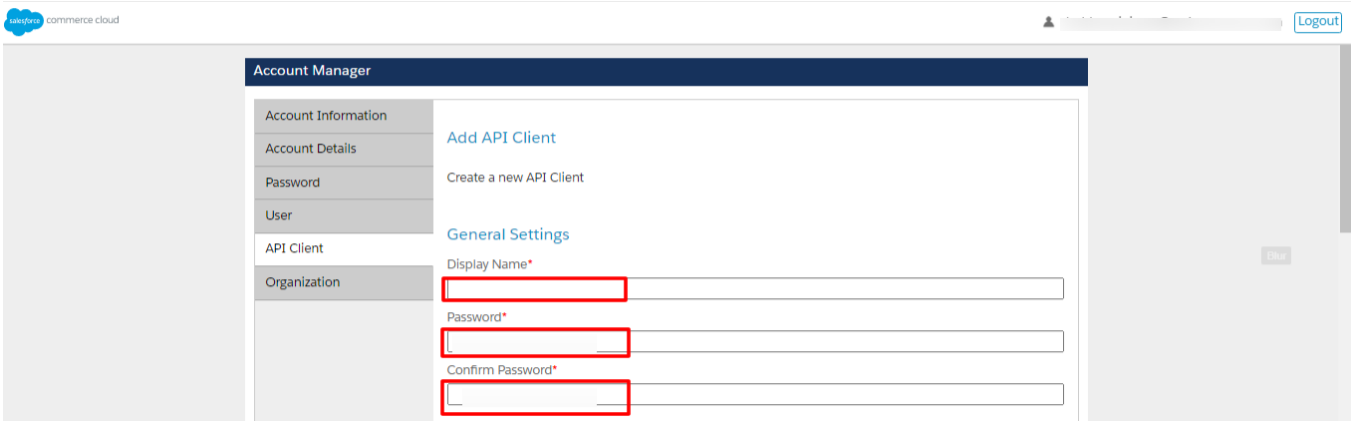
- Click on **“Add API Client”** as displayed below:



- First, you need to fill over here is **General Settings.**
  - Add **“Display Name”** as your Organization Name.
  - Create at least 12 characters **“Password”** (should contain numbers & letters — e.g. 123456789abc).
  - **“Confirm Password”** created.

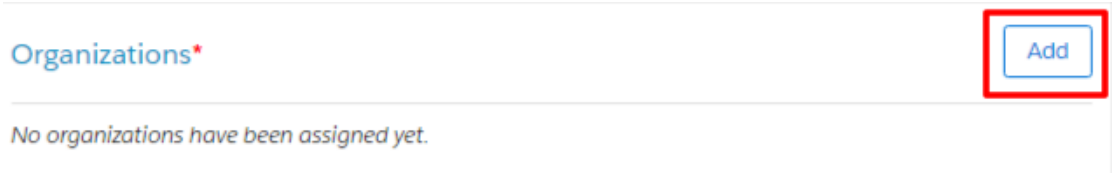
We recommend you save both these important details separately on a notepad.

Note: This password is your Account Manager Secret Key that you need to fill at the second field in Verify your credentials Page on CedCommerce API.

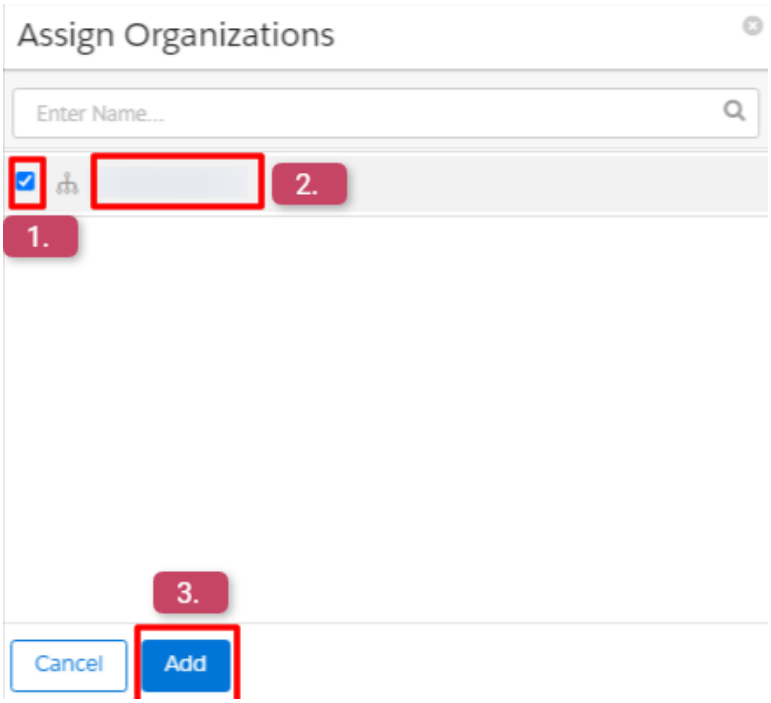


- Scroll down and checkmark **“Enabled”** in **“Access Control”.**

- In the next step, Click on **“Add”** in **“Organizations”**.

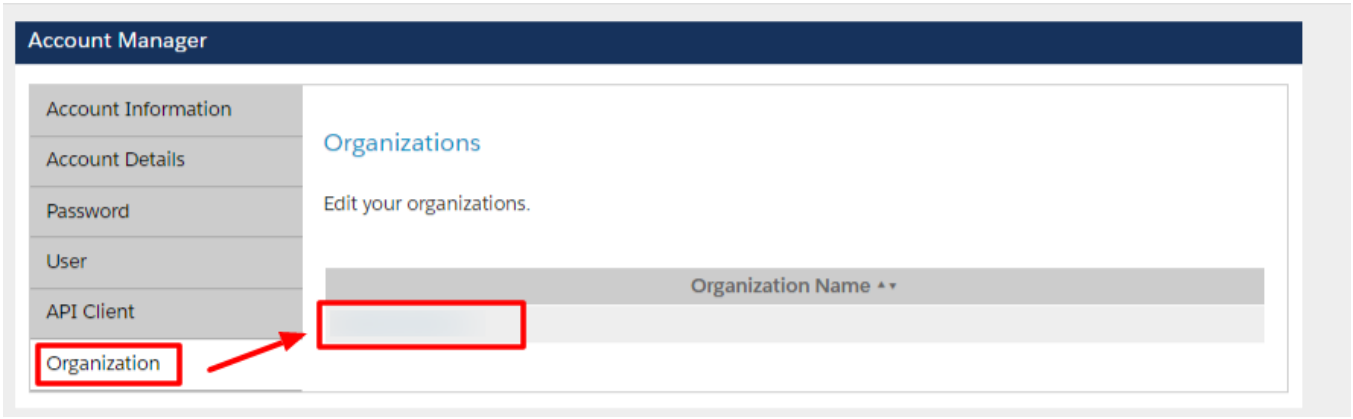


- Further, under **“Assign Organizations”**, tick mark on the checkbox of your Organization Name and click on **“Add”**.

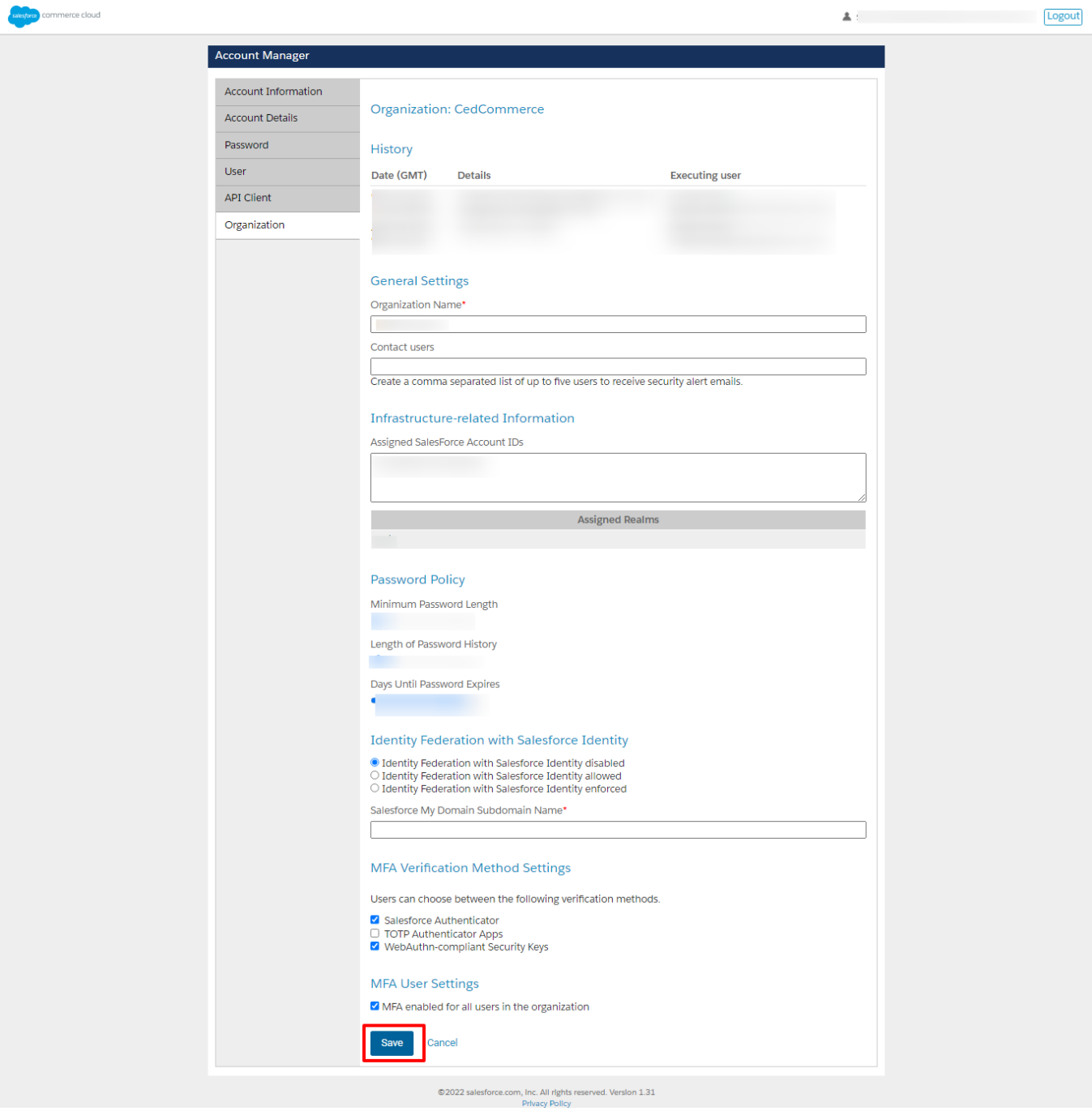


If you don’t get your Organization Name over here, don’t panic.

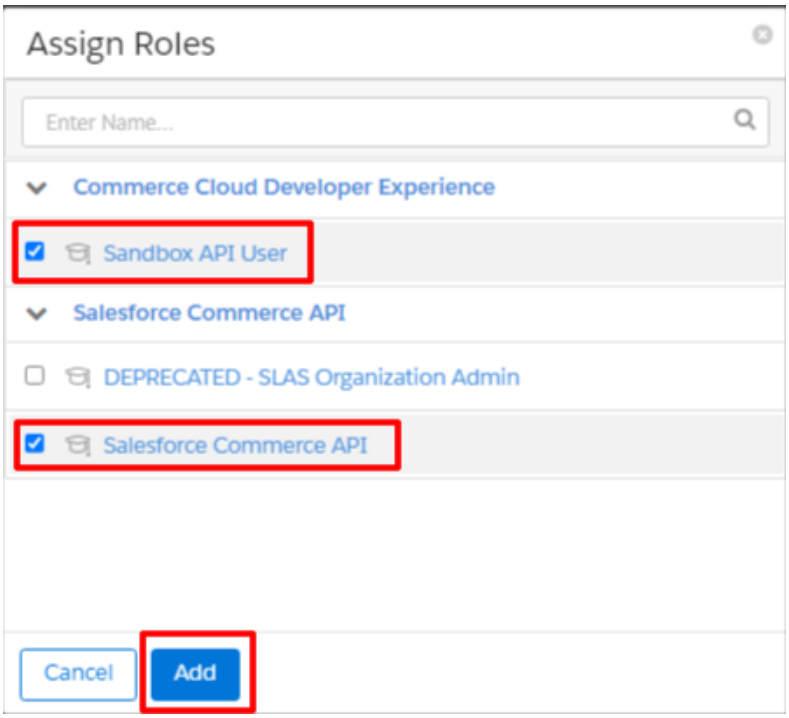
Move back to the **“Account Manager”** —> Go to **“Organization”** available on the Left Hand Side and click on your **“Organization Name”** as displayed below.



Next, verify that Salesforce has assigned a domain to your organization —> Furnish the basic details and click on **“Save”.**

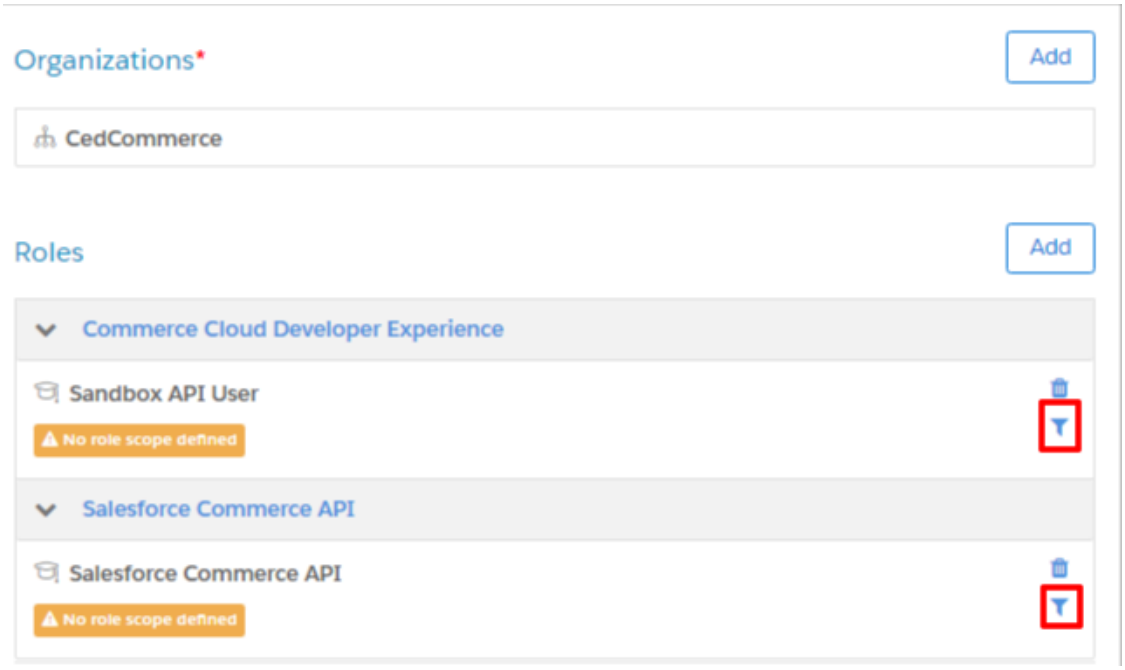


- Further, click on **“Add”** under **“Roles”.**

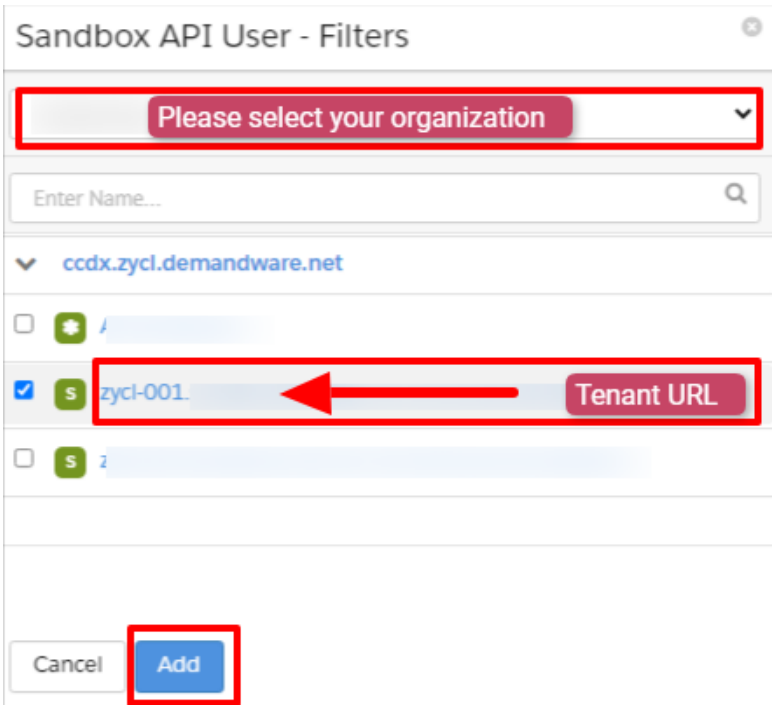


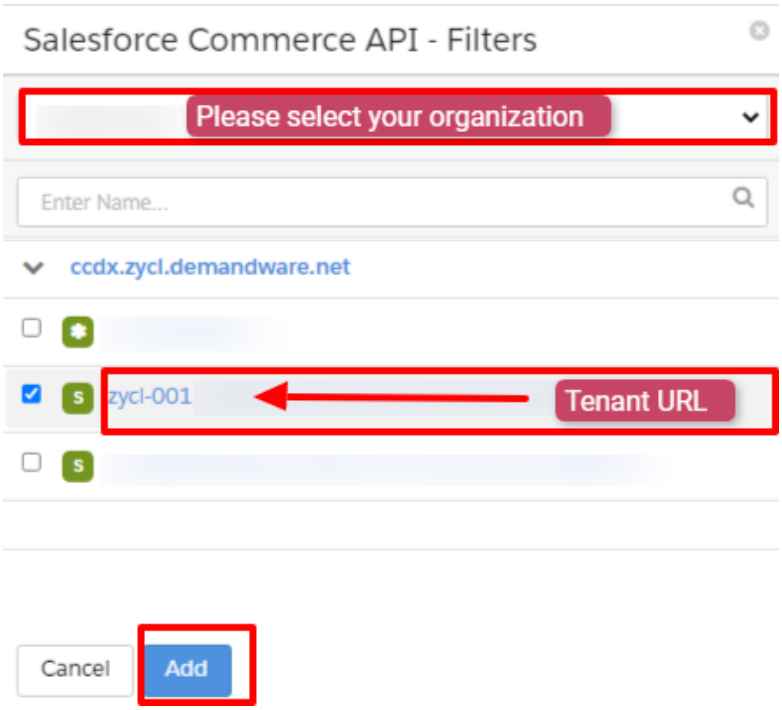
Now **“Assign Roles”** by check-marking **“Sandbox API User”** and **“Salesforce Commerce API”** and at last click on **“Add.”**

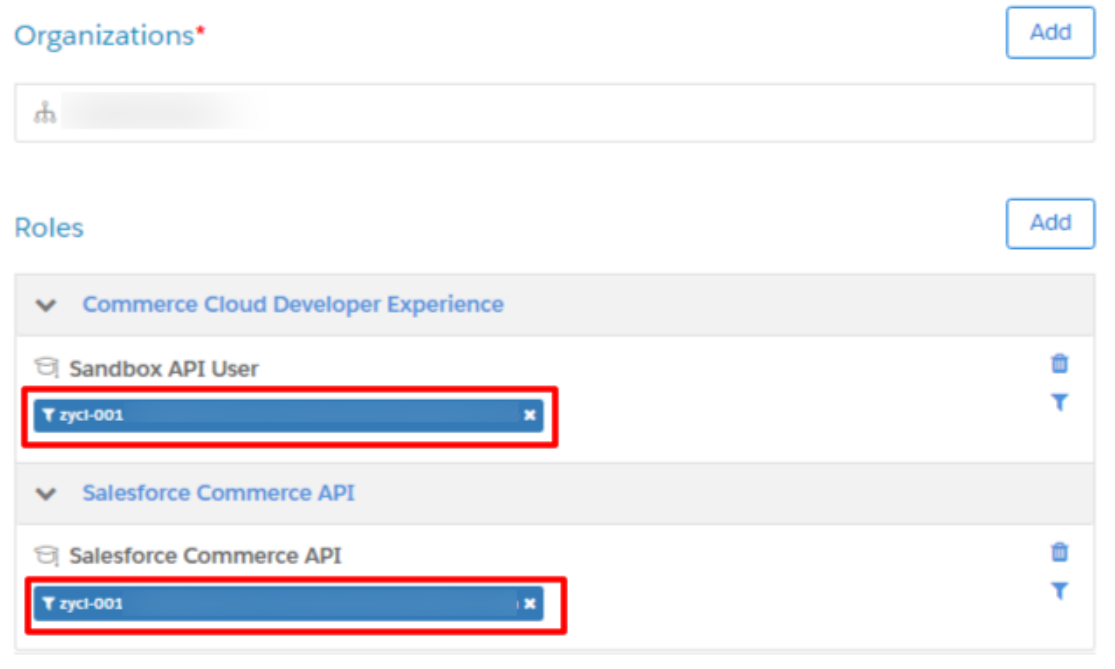
- Once you are done with **assigning organization (4)** and **roles (5)**, click on the **Filter icons of Sandbox API User and Salesforce Commerce API roles** as displayed below:



In both roles, select the **Tenant URL** of your commerce store and click on **“Add”** as displayed below:


Sandbox API User - Filters
Please select your organization
Enter Name...
ccdx.zycl.demandware.net
zycl-001
Tenant URL
Cancel
Add


Salesforce Commerce API - Filters
Please select your organization
Enter Name...
ccdx.zycl.demandware.net
zycl-001
Tenant URL
Cancel
Add



- In the final step —> scroll down, **add** the following under **“OpenID Connect”** and click on **“Save”** as displayed below:

Default Scopes:

roles
tenantFilter
profile

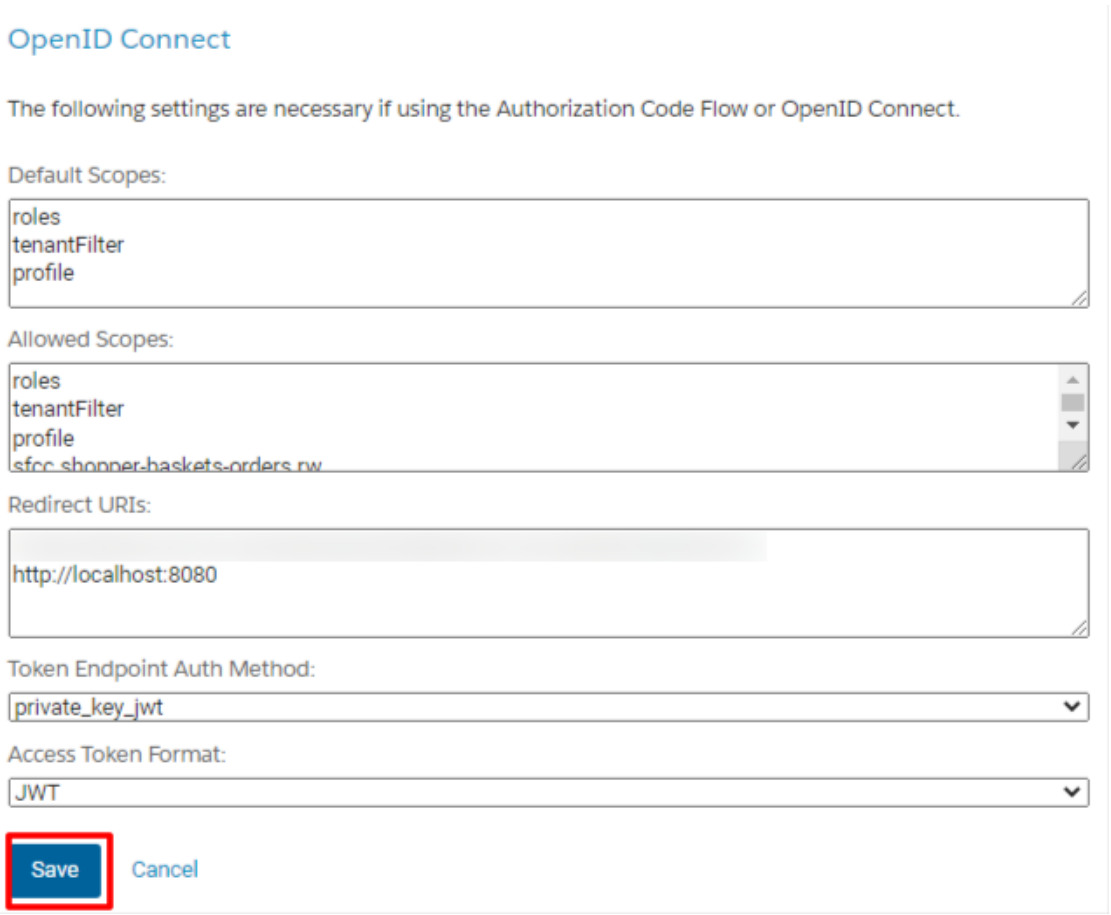
Allowed Scopes:

roles
tenantFilter
profile
sfcc.shopper-baskets-orders.rw
sfcc.catalogs
sfcc.catalogs.rw
sfcc.shopper-categories
sfcc.shopper-product-search
sfcc.products
sfcc.shopper-products
Sfcc.products.rw

Redirected URLs: http://localhost:8080

Token Endpoint Auth Method: private_key_jwt

Access Token Format: JWT



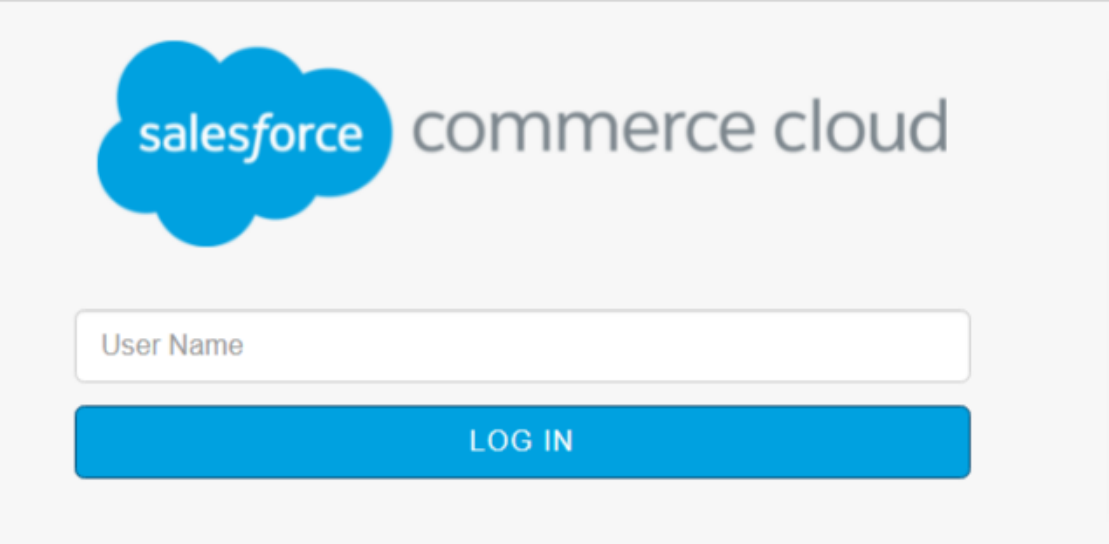
3.1.5. Get Short Code, Organization ID, and Site ID from Salesforce Business Manager

- Go to the **Business Manager** of your store —> you will get the **Login Page** as displayed below.

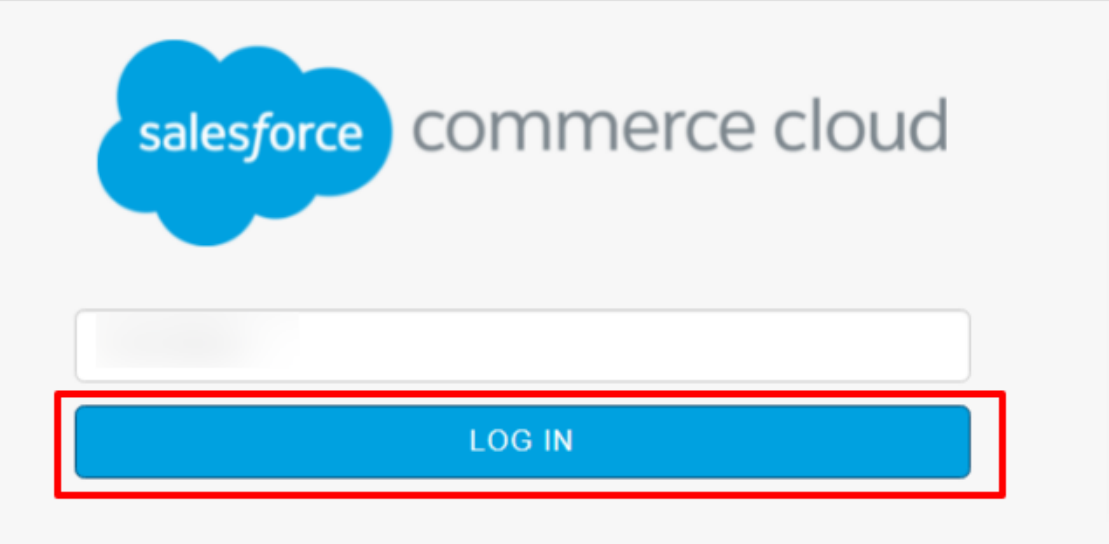
The URL for the same would be —> (Your Sub Domain URL)/on/demandware.store/Sites-Site.

For example,

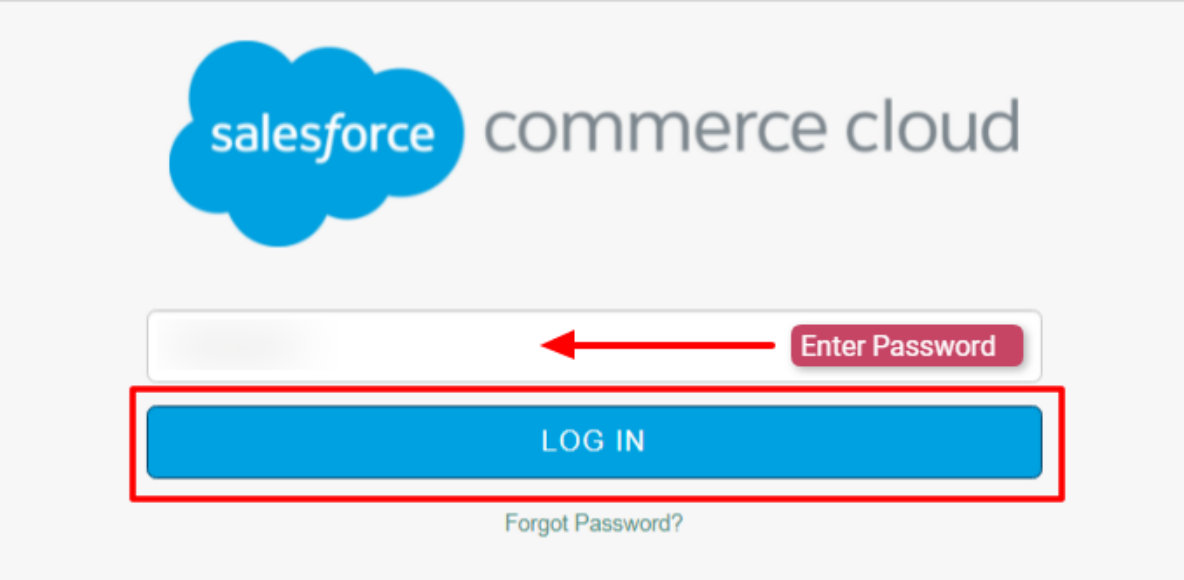
https://zycl-001.sandbox.us01.dx.commercecloud.salesforce.com/on/demandware.store/Sites-Site



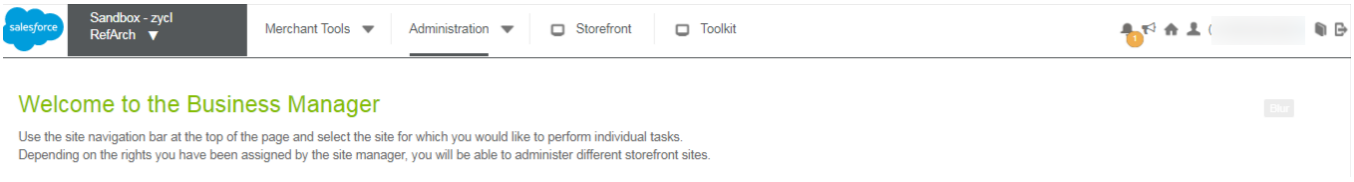
- Enter the **“Email Address”** you have registered on Salesforce Commerce Cloud and click on **“Login”.**



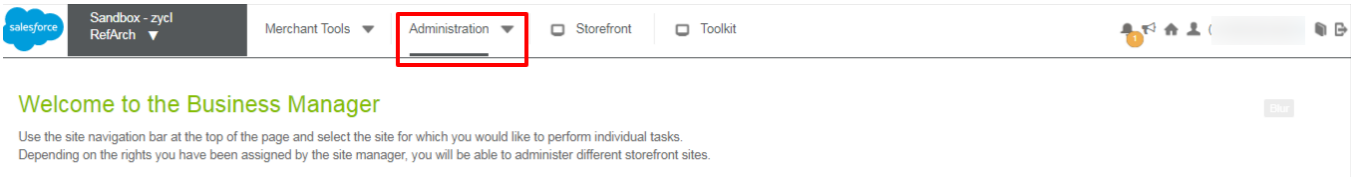
- Enter the **“Password”** and click on **“Login”**.



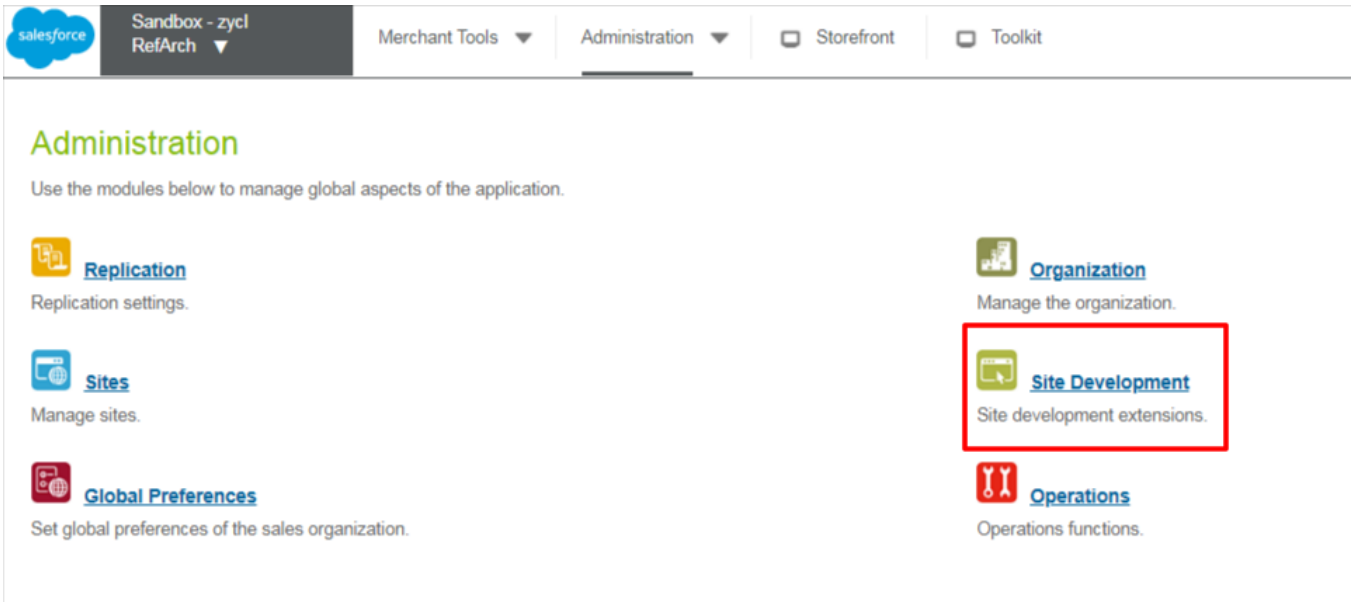
- You will be redirected to the Business Manager Dashboard.



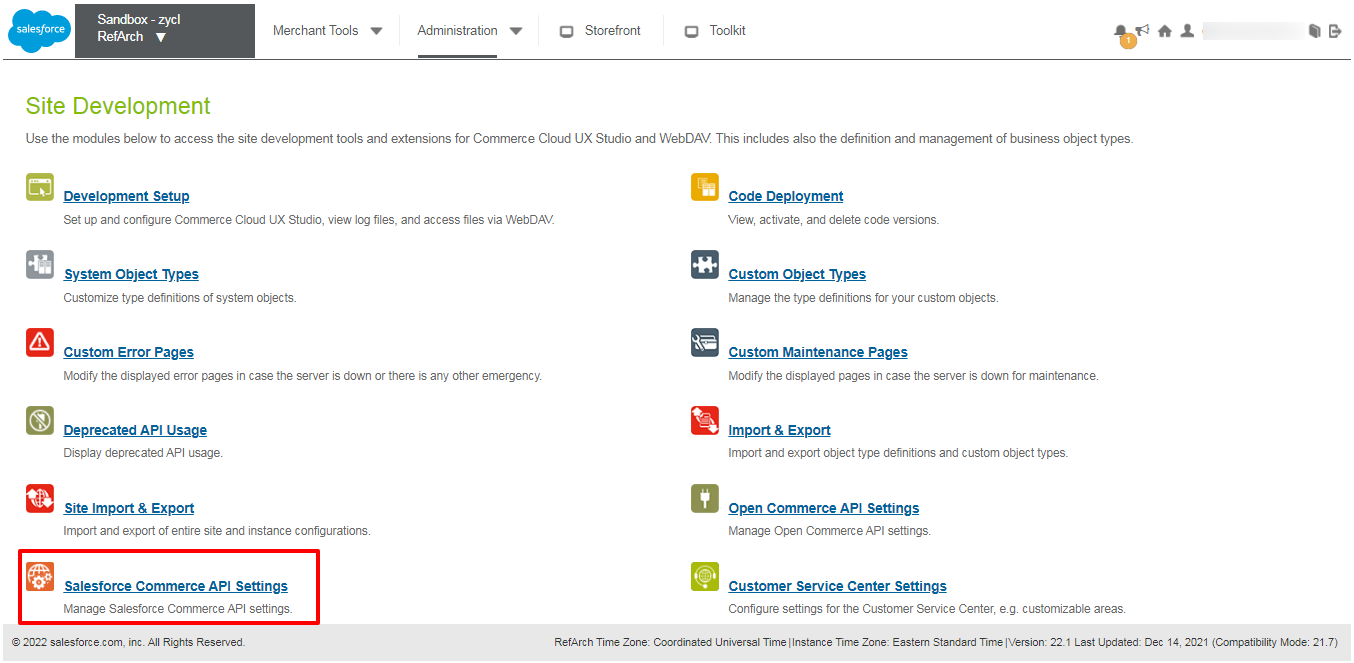
- Now, click on the **“Administration”** as displayed below:



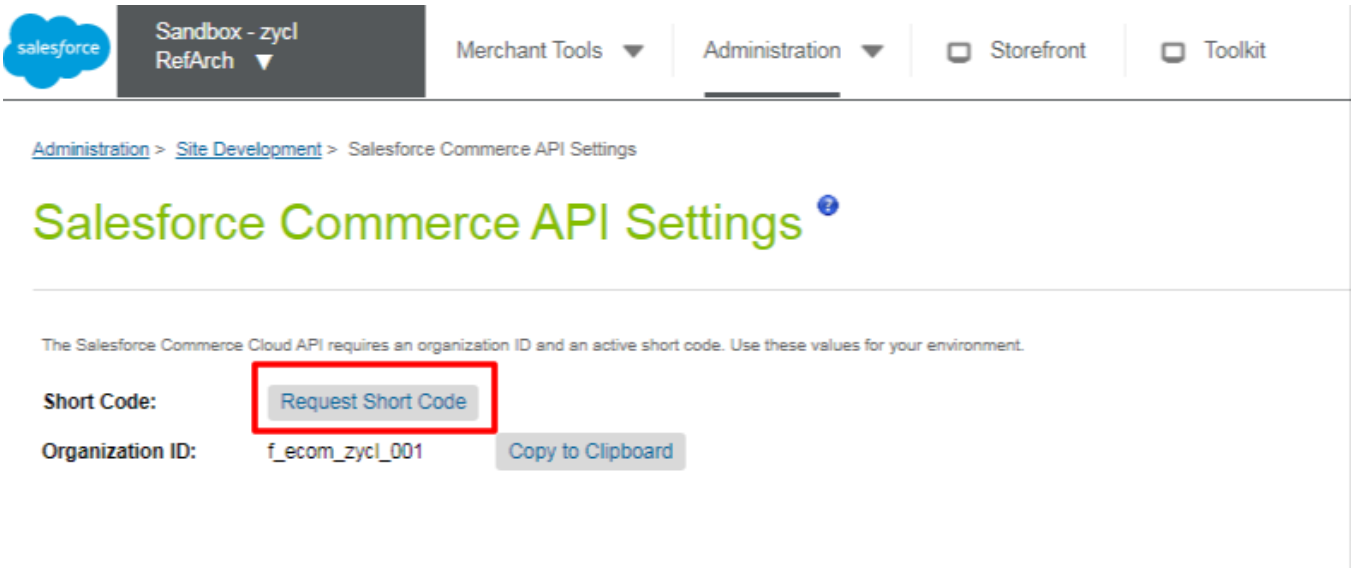
- You will be redirected to the Administration Dashboard, next click on **“Site Development”** as shown below:



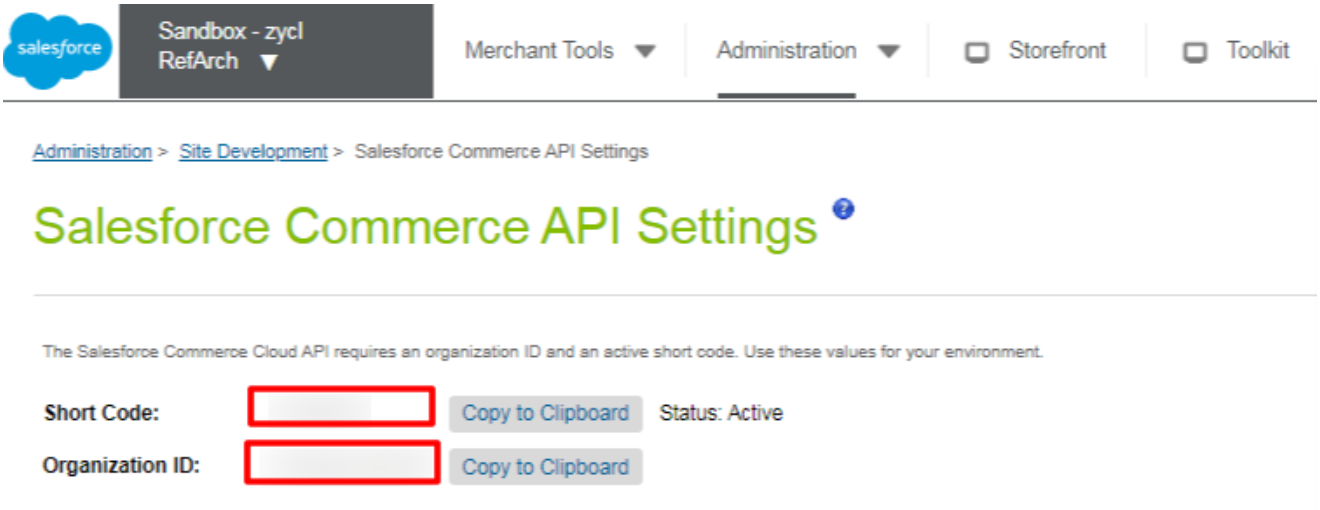
- Under the dashboard of Site Development, you will see 12 options. You only have to click on **“Salesforce Commerce API Settings”** as displayed below.



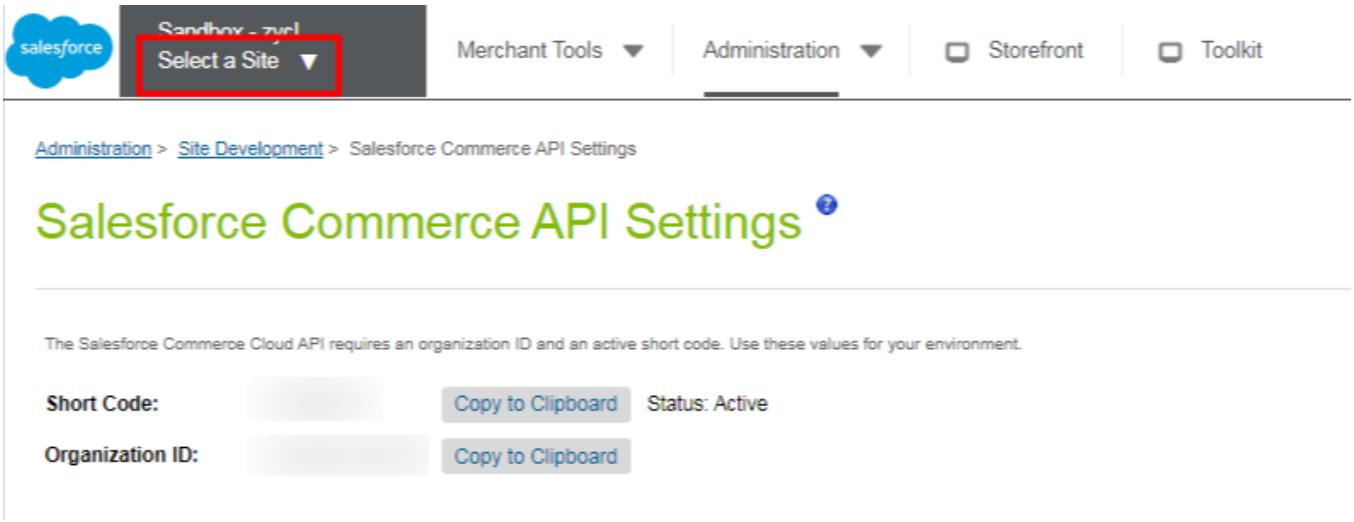
- From here you will get **“Short Code”, “Organization ID”, and “Site ID”** i.e. the fourth, fifth, and sixth fields required at Verify your credentials Page on CedCommerce API.
    - For **Short Code**, click on **“Request Short Code”** as displayed below.



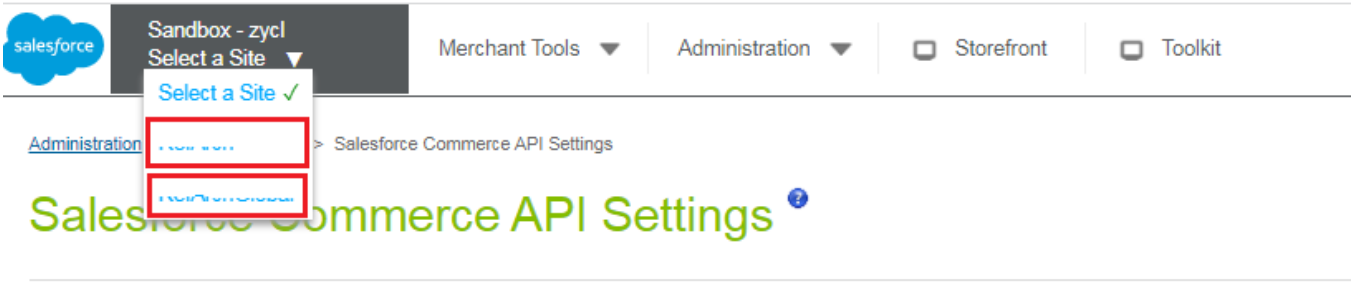
Further, copy **Short Code and Organization ID** as shown below:



For **“Site ID”**, go to the top left corner and select a site as displayed below:



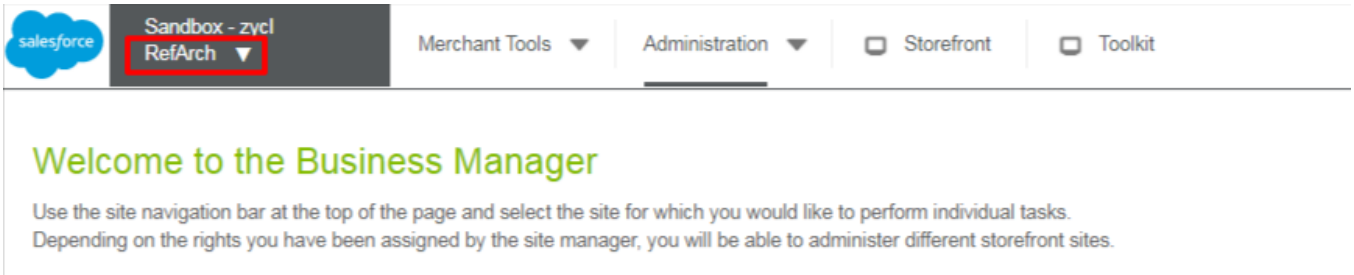
On selection, it will **display all the site names which are Site IDs (i.e. Site Name=Site ID)** configured with your Salesforce Business Manager as displayed in the screenshot below.



Now **select the site ID you want to connect with CedCommerce API** and **copy exactly the same** as written over there.

For your better understanding, we have shown below a sample for you.

The Site ID of the merchant is “RefArch”. The merchant has to copy and paste as it is in the sixth field of the Verify your credentials Page in CedCommerce API.



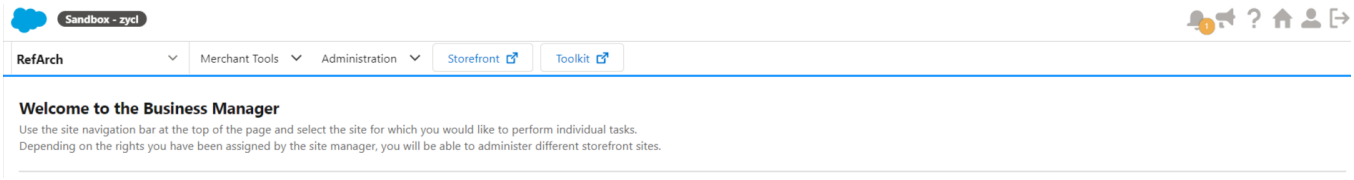
With this, you have successfully retrieved the subsequent three fields of the **“Verify your credentials”** Page.

Further, visit back to the CedCommerce App and complete the Onboarding Step 1 as guided below.

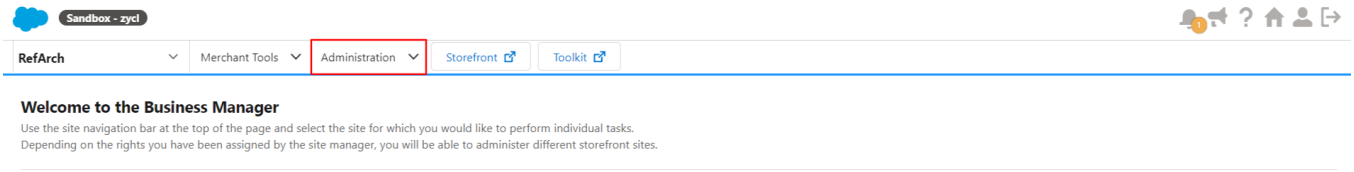
If you need any help regarding login, please refer to [How to Sign in on CedCommerce App.]

3.1.6. How to get your Business Manager User ID?

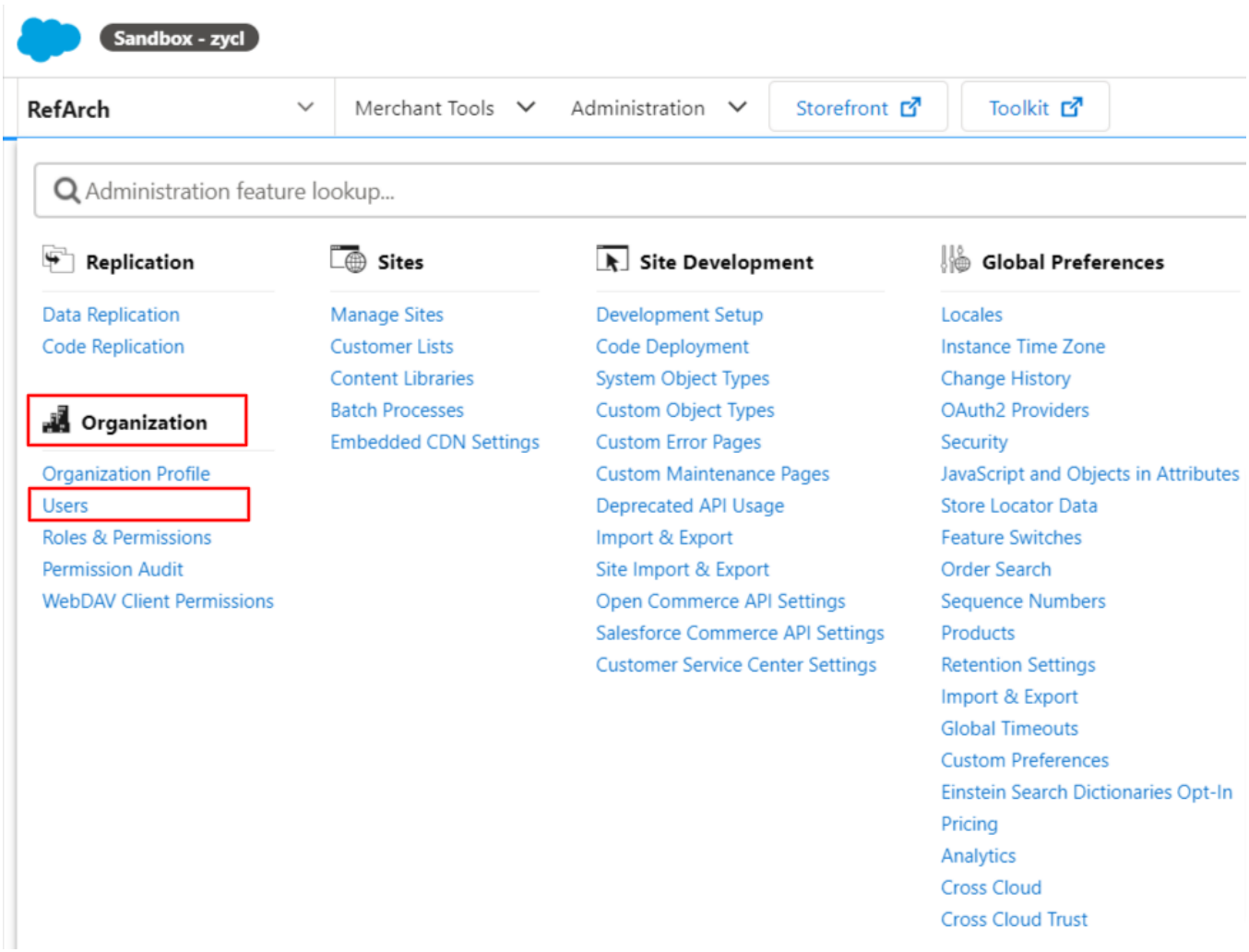
- Login in to your Salesforce Commerce Cloud account enter your credentials – you will be redirected to the Business Manager page as shown below:-



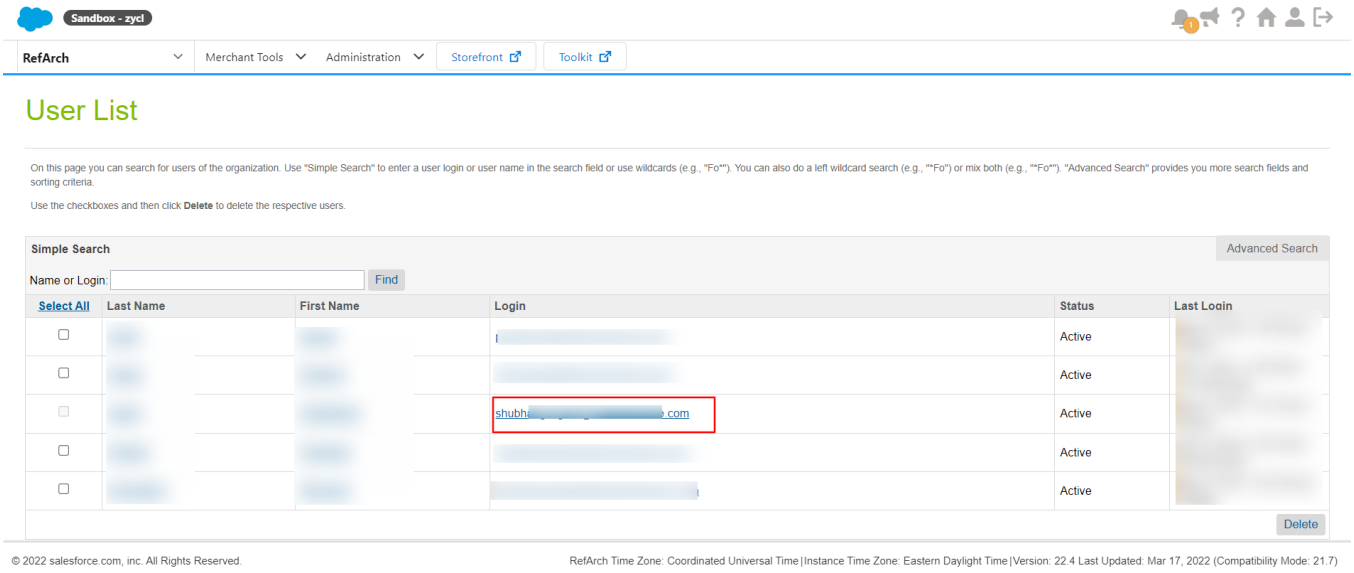
- Click on the “**Administration**” tab as shown below:



- Now click on the “**Organization**” block in the left, and a list of options opens – select the “**Users**” option to proceed further. Refer to the image below for better understanding-



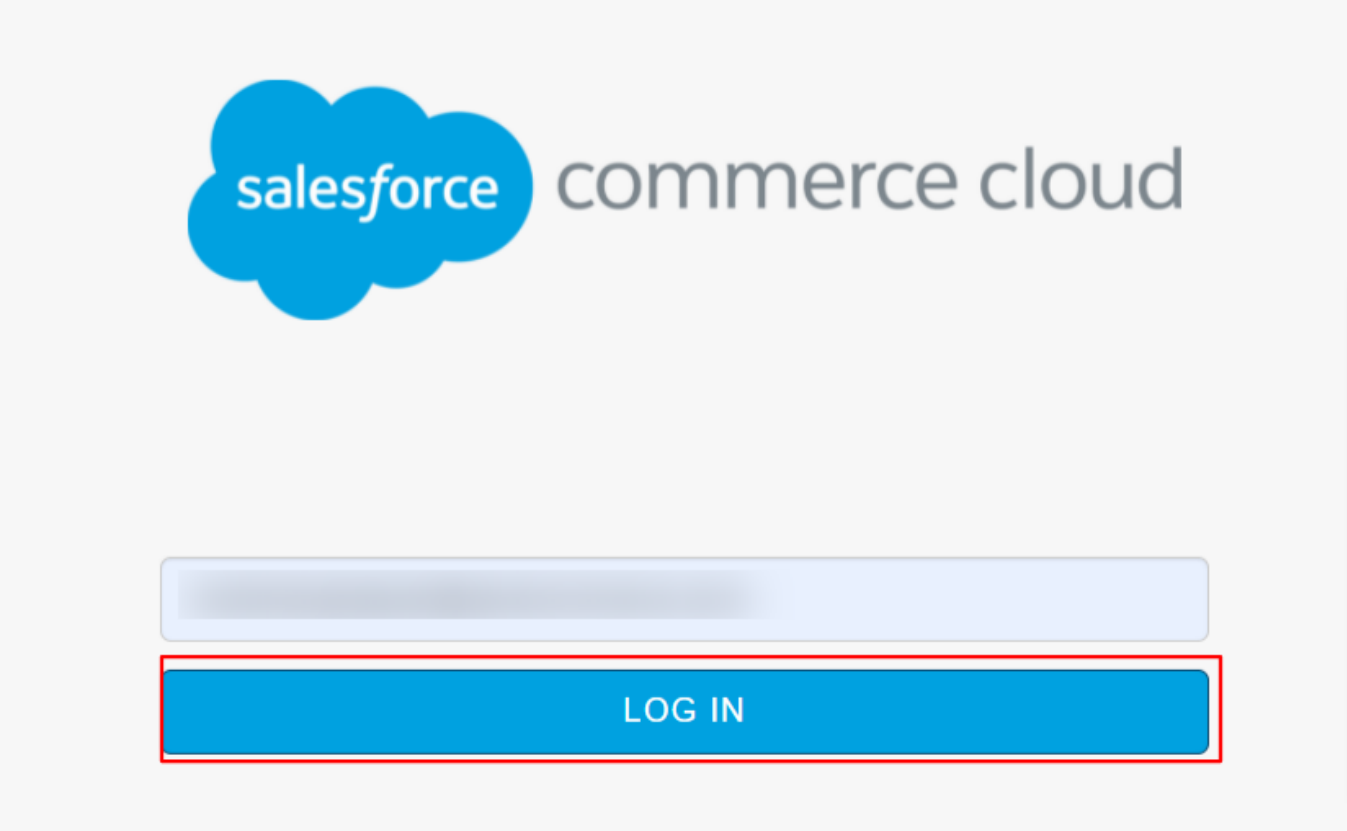
- The complete "**Users List**" will be displayed, and you can find your **Business Manager User ID** in the list. Refer to the image for better understanding –



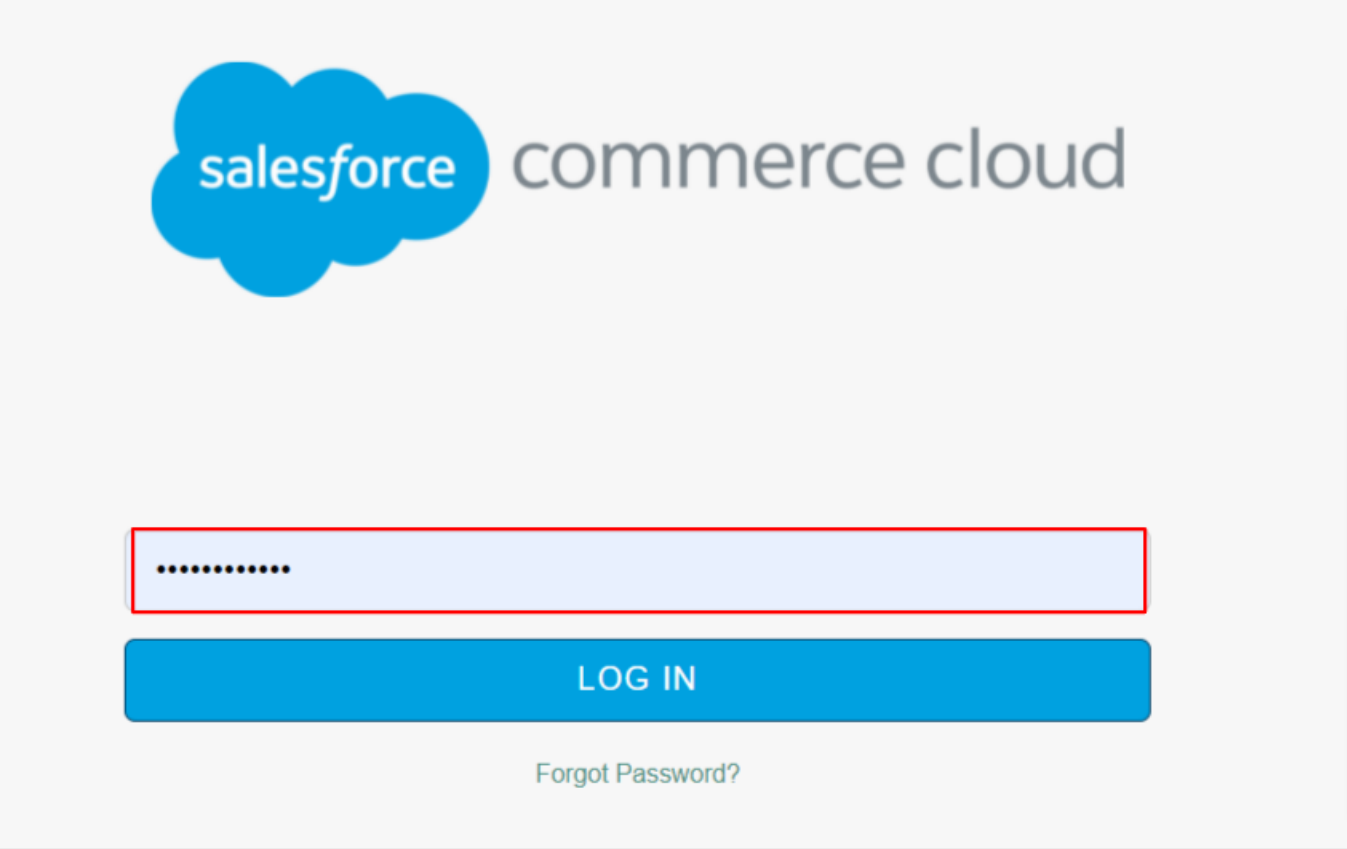
How to get your Business Manager User Password?

Business Manager User password is that password you've used while creating your Business Manager User ID for **Salesforce Commerce Cloud**.

To get that, you simply need to enter your **Business Manager User ID** as shown below –



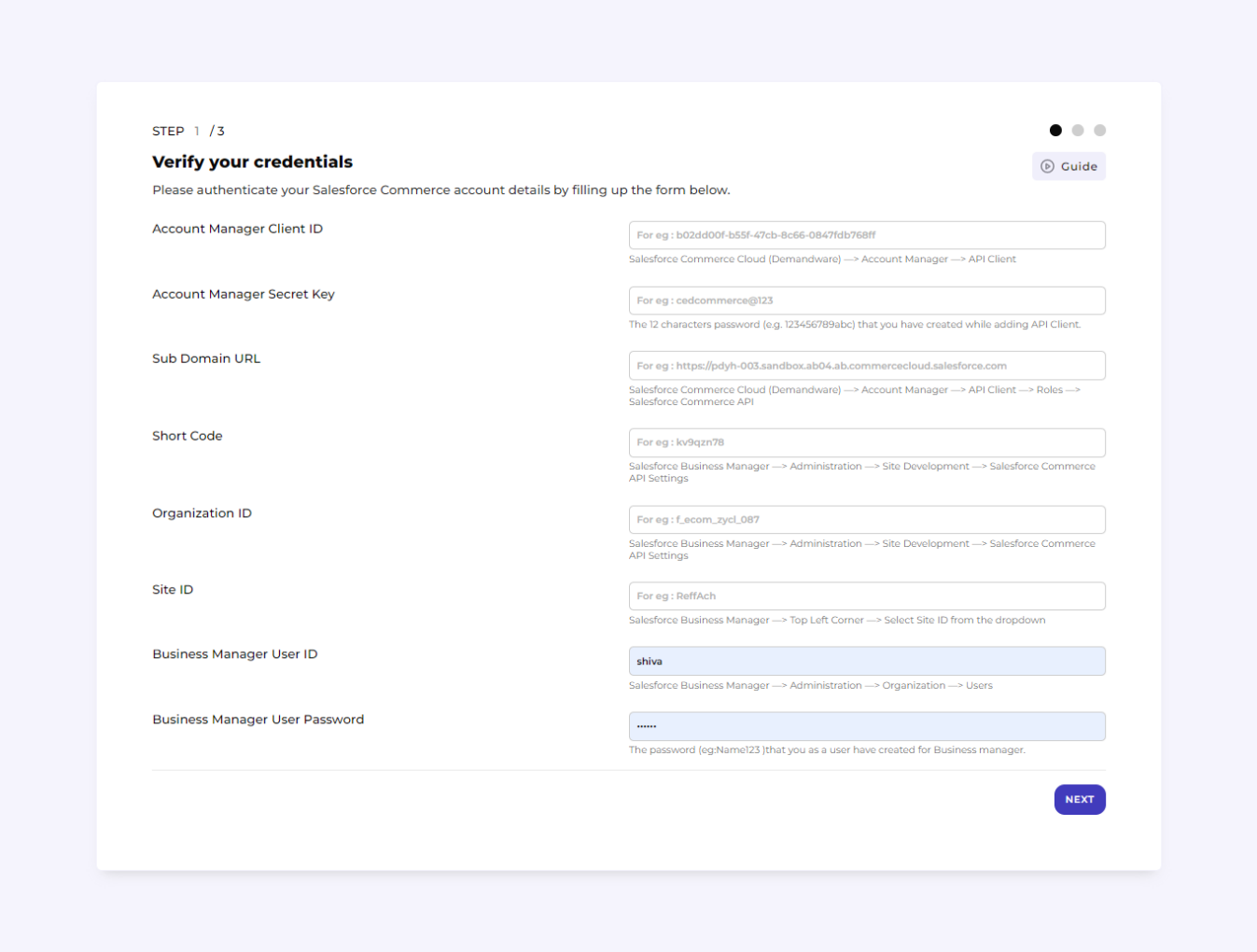
And then, your password will be auto-displayed (if you have saved the credentials while creating your ID). Refer to the image for better understanding-



This is the password that you have to enter in the app.

3.1.7. Verify your credentials on app

Enter details in all eight fields, and click on “**Next**” as displayed below:

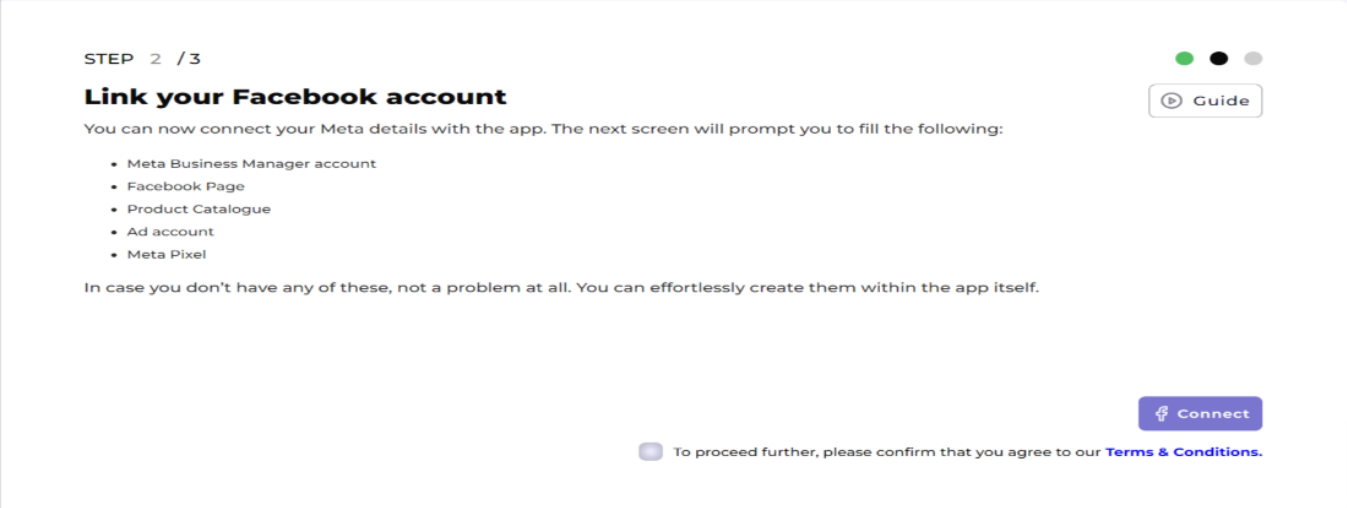


Now, you will be asked to connect your Facebook account with CedCommerce API. The complete process is described in the upcoming Section.

3.2. Connect Facebook Account with app

Step 1:

Connect your existing Facebook Account with CedCommerce API by clicking on **“f Connect”** as displayed in the below screenshot.



3.2.1. Onboarding to Facebook Business Extension

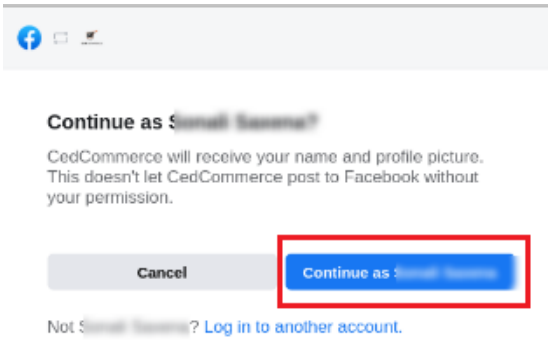
Merchants can now easily set up their Meta pixels, catalog, and also run their business through Facebook and Instagram Shops. By integrating with Facebook Business Extension, you can unlock a broad suite of Facebook business tools for your customers in the eCommerce and services verticals experiences such as Facebook Shops, Dynamic Ads, and other business tools available across the Facebook family of apps.

Benefits of Facebook Business Extensions

Facebook Business Extension (FBE) makes it easier for businesses to list products and offer other variety of services like run ads, look after the Facebook & Instagram insights, surface products to a targeted audience, and much more; right from a single place. Once you integrated with the Facebook Business Extension, you can easily manage your Meta assets like; Facebook product catalog, Meta pixel, Facebook page, and Instagram profile without any hassle.

Step 1:

Here, you need to allow permission to CedCommerce API to access your Profile Name and Profile Picture, click on the **"Continue as (your name)"** button as displayed below.

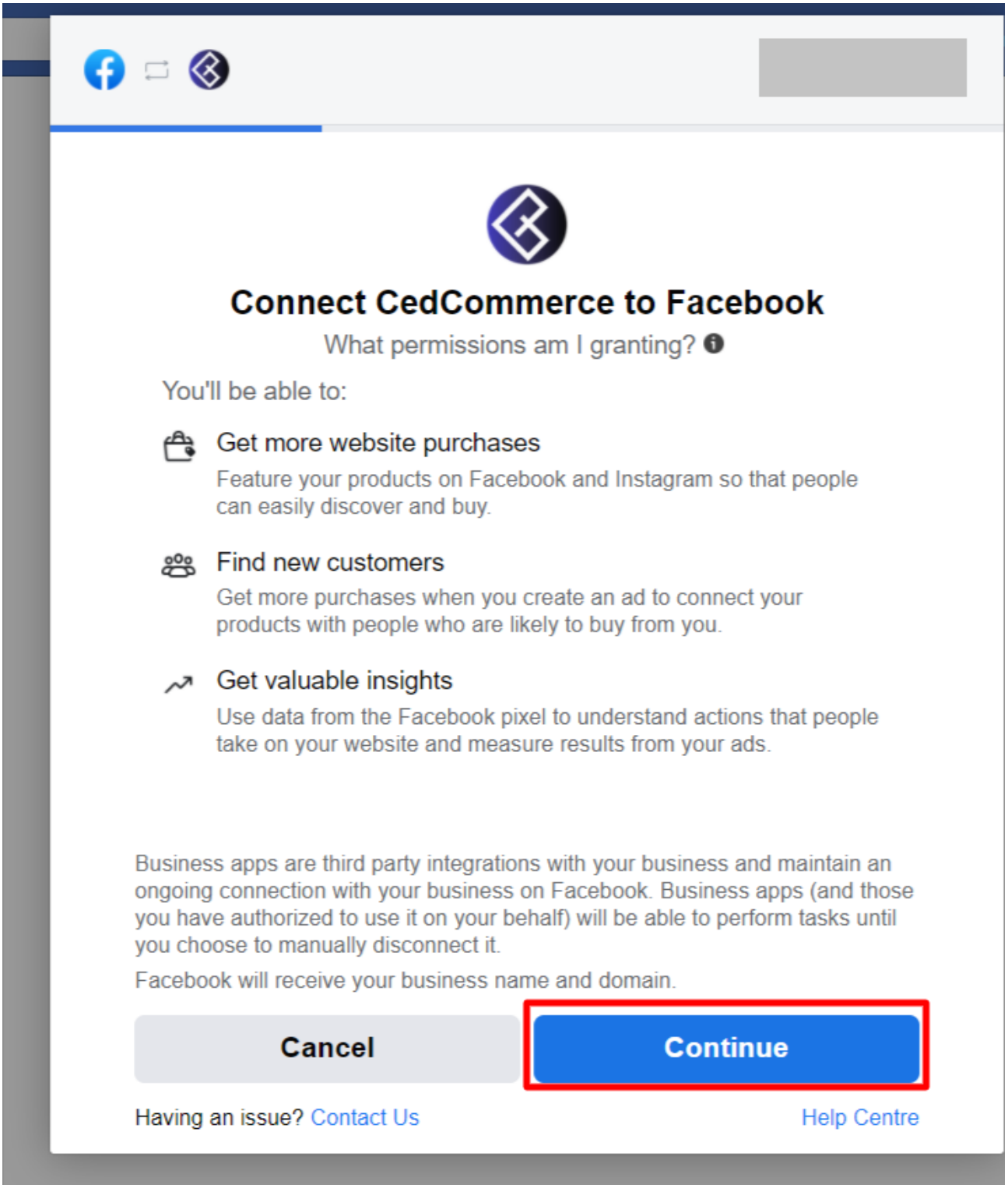


Step 2:

In this step, you will get to know what are the benefits of connecting with CedCommerce API for Facebook Shops:

- Get more website purchases
- Find new customers
- Get valuable insights

Further, **click on “Continue”** as displayed below to step into the next step.



Step 3:

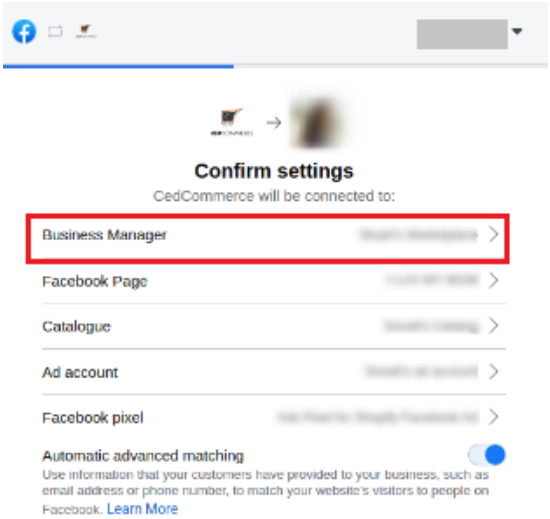
Now here you need to **perform 5 tasks** – provide information as listed below and thereafter you need to **confirm the settings** by clicking on the **“Continue”** button.

- **Connect Meta Business Manager Account**
- Connect Facebook Page
- Connect Meta Product Catalogue
- Connect Meta Ad Account
- Connect Meta Pixel
- **Connect to Instagram Shopping**

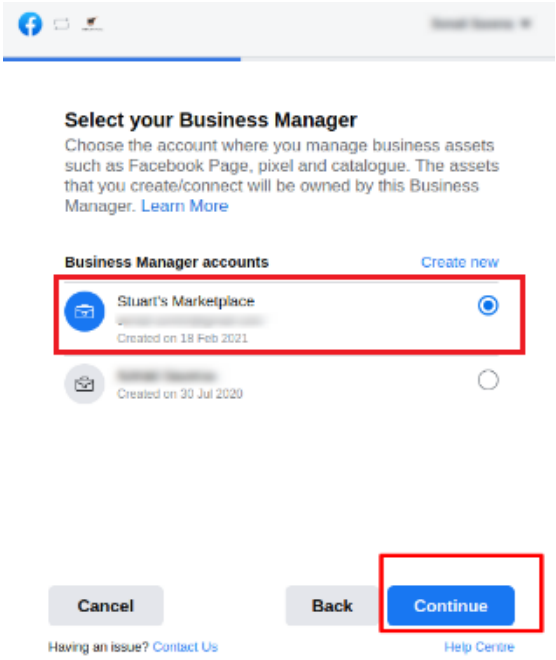
But before it, let’s understand how to perform each task.

3.2.1.1. Connect Meta Business Manager Account

Click on **“Business Manager”** as displayed below:

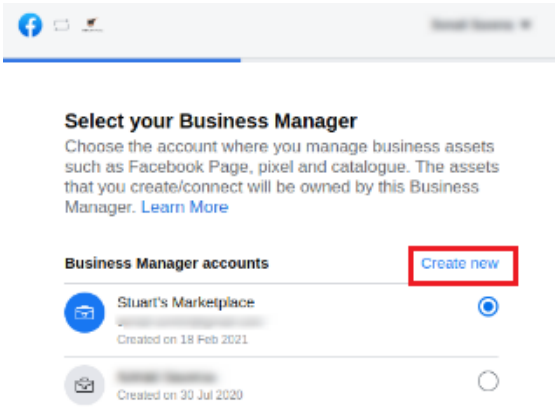


You will be redirected to **select your Business Manager Account** as shown below. Choose the account you wish to connect with CedCommerce API and thereafter, **click on “Continue”**.



3.2.1.1.1. How to Create a New Meta Business Manager Account

If you **don't find any options** under **"Business Manager Accounts",** it means you don't have a Business Manager Account. In this case, **"Create New"** within the app itself as shown below:



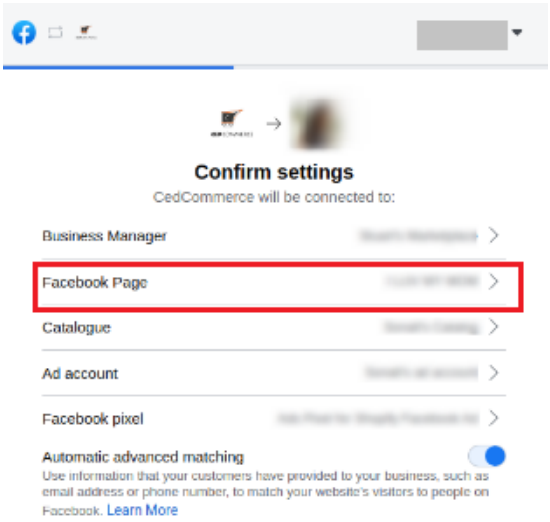
A new window or tab will get in front of you in which you need to **fill in the following details**. After that click on **"Next"**.

- Your Business Name
- Your Name
- Your Business/Work Email Address

Now, **fill up the required business details** and then click on the **“Submit”** button.

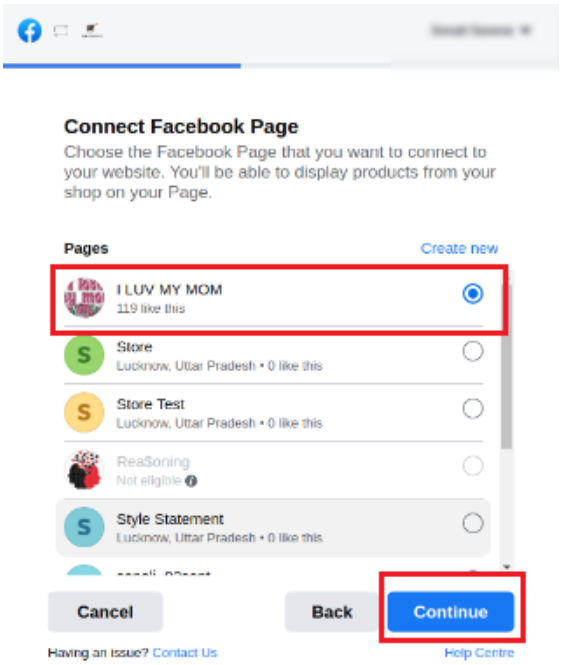
3.2.1.2. Connect Facebook Page

Click on **“Facebook Page”** as displayed below:



You will get the **list of all the Facebook Pages associated with the Business Manager Account** you have selected in **the previous step.**

Choose the Facebook Page you wish to connect with CedCommerce API and thereafter, **click on “Continue”** as displayed below:



3.2.1.2.1. How to create a new Facebook Page

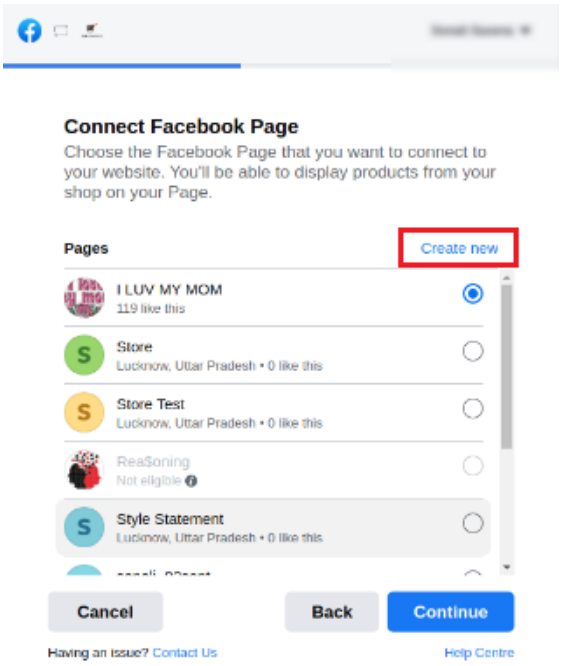
In case you are new to the Meta business and you do not have an existing page on Facebook, you can create a new Facebook page and then connect it with the website.

You can create a new page for your Facebook account in two ways:

- From the Facebook panel at https://www.facebook.com/pages/create/?ref_type=hc
- From the Commerce Manager

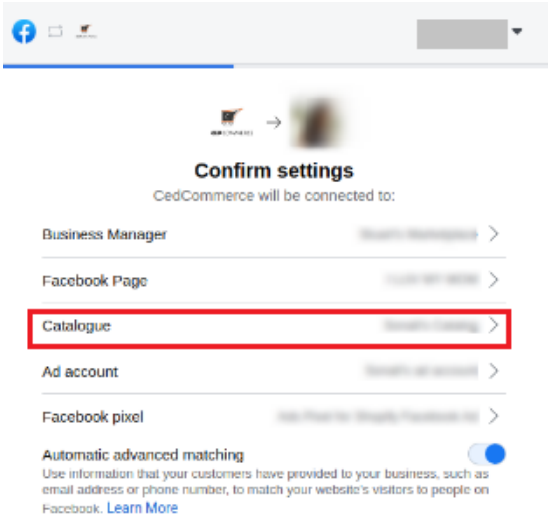
  *Note: To create a new Facebook page for your business, you need the Page type and desired product category to convert the same into a Shop. Check detailed page requirements here

The process is simple and you can carry it out within the app itself by simply clicking on “Create New” as shown below:



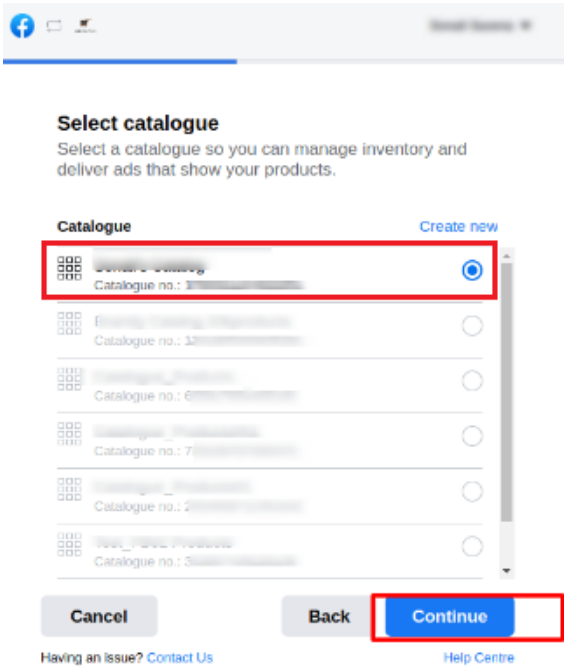
3.2.1.3. Connect Meta Product Catalogue

Click on **“Catalogue”** as displayed below:



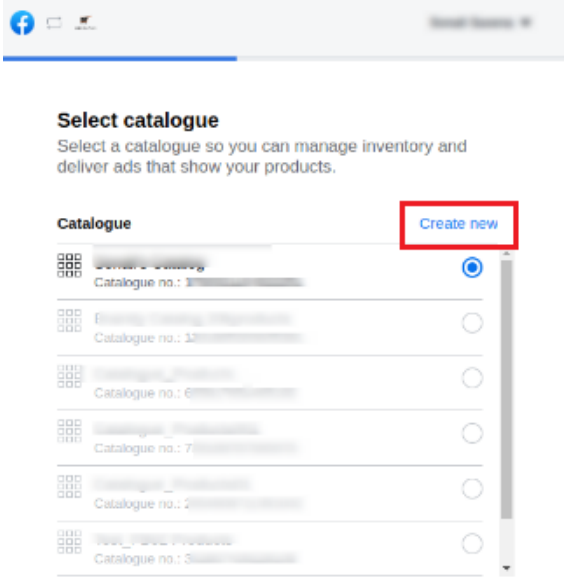
Next, you need to select the **Product Catalogue of your Commerce Store** that you wish to **connect with the Facebook Page** selected in the previous step.

Further, click on **“Continue”** as displayed below



3.2.1.3.1. How to create a new Meta product catalog

If you **don’t find any options** under “Catalogue” or in case you **want to create a separate** product catalogue dedicated for Meta and Instagram Shops, click on **“Create New”** as displayed below:

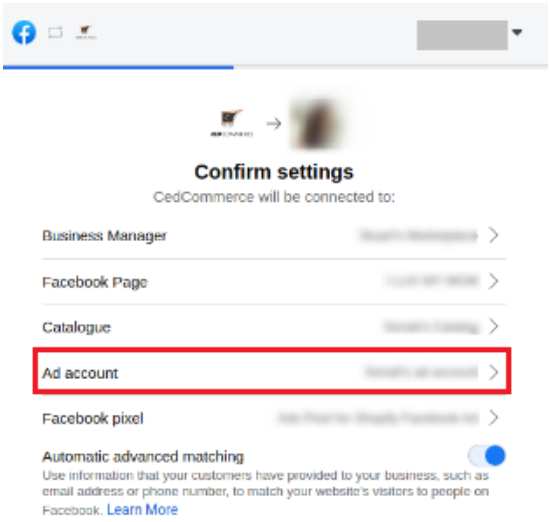


You will be redirected to the **Meta Commerce Manager.** Now, select **“Product & Settings”** and click on **“Create New Product Catalogue”.**

Once you are done with it, start adding products to the newly created catalogue and define the attributes of your products.

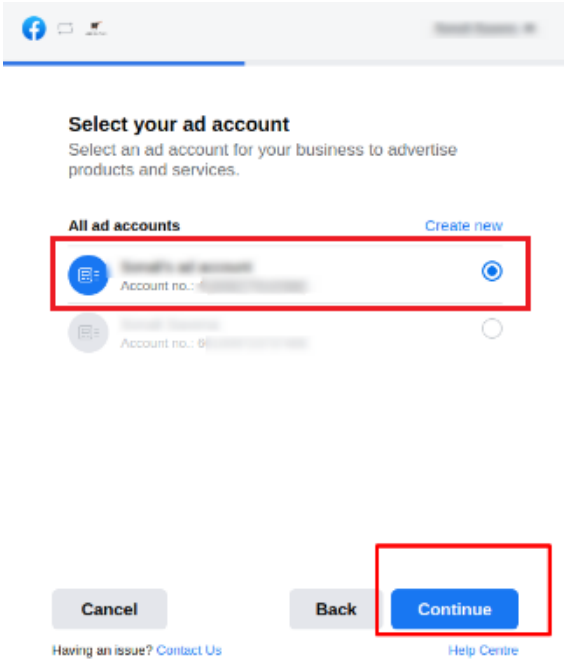
3.2.1.4. Connect Meta Ad Account

Click on **“Ad account”** as displayed below:



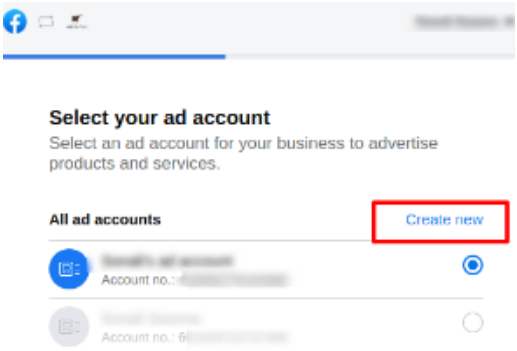
Here, you will the **list of all the MetaAd Accounts associated with the Business Manager Account** you have selected.

Choose the Ad Account you wish to connect with CedCommerce API and thereafter, **click on “Continue”** as displayed below:



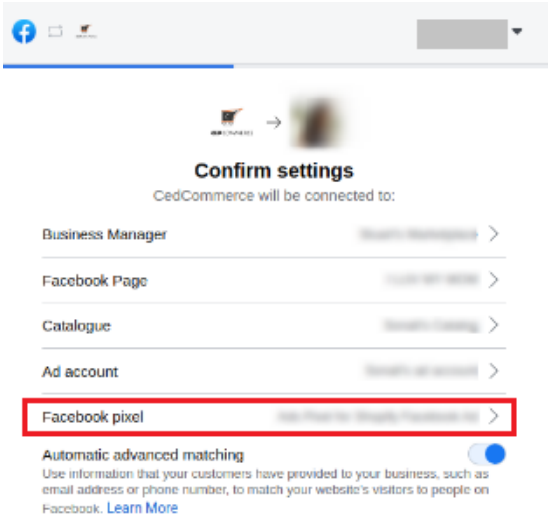
3.2.1.4.1. How to create a new Ads Account

If you **don't find any options** under "All Ad Accounts", create an Ad Account (connecting with your Business Manager account) within the app itself by clicking on **"Create New"** as shown below:

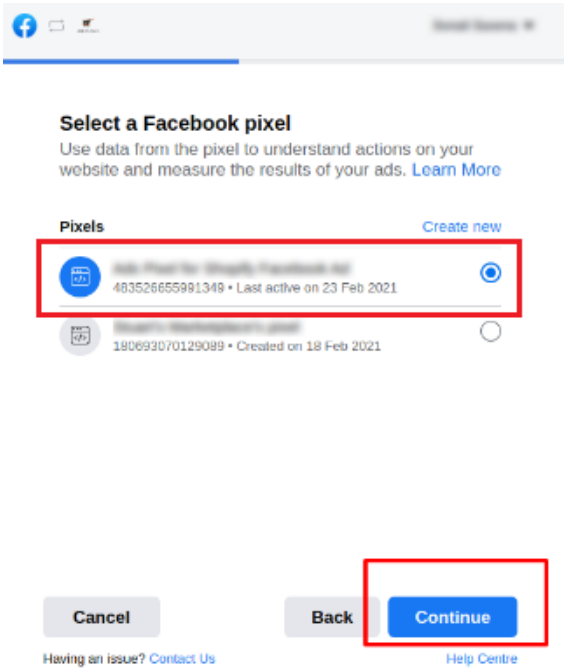


3.2.1.5. Connect Meta Pixel

Click on **"Meta Pixel"** as displayed below:

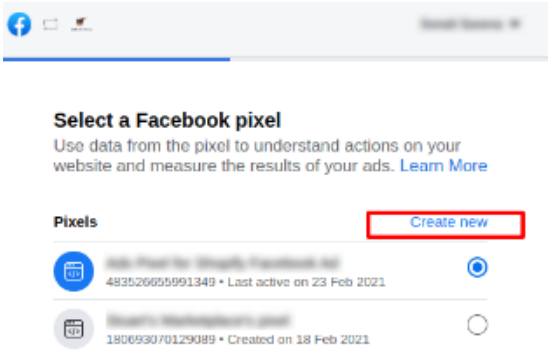


Select the Meta Pixel Code from the list you wish to connect with the Meta Ad Account you have selected and click on **“Continue”** as displayed below:



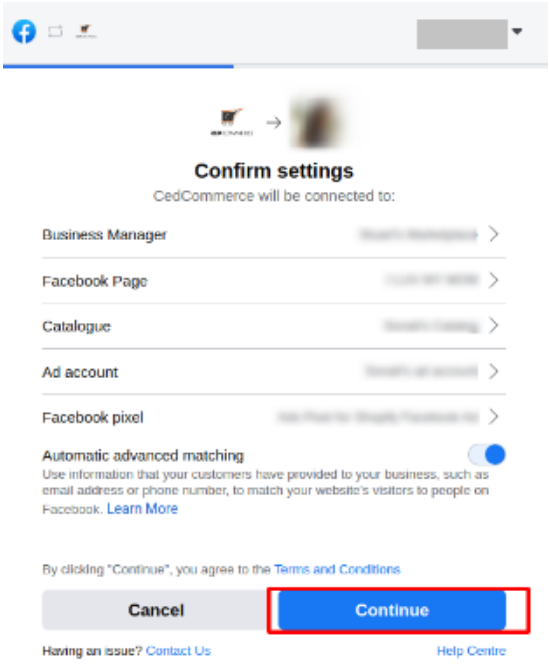
3.2.1.5.1. How to create a new pixel

If you **don’t find any options** under “Pixels” or in case you **want to create a separate** one for the Ad Account dedicated only for Facebook and Instagram Shops, click on **“Create New”** as displayed below:



With this, you have successfully connected Meta Business Manager, Facebook Page, Meta Product Catalogue, Meta Ad Account, Meta Pixel Code with CedCommerce API.

Next, you need to **confirm the settings** (details provided) as we mentioned in the **initial stage**. For your convenience, we have re-attached the tab snapshot below to avoid any confusion – simply click on **“Continue”**.



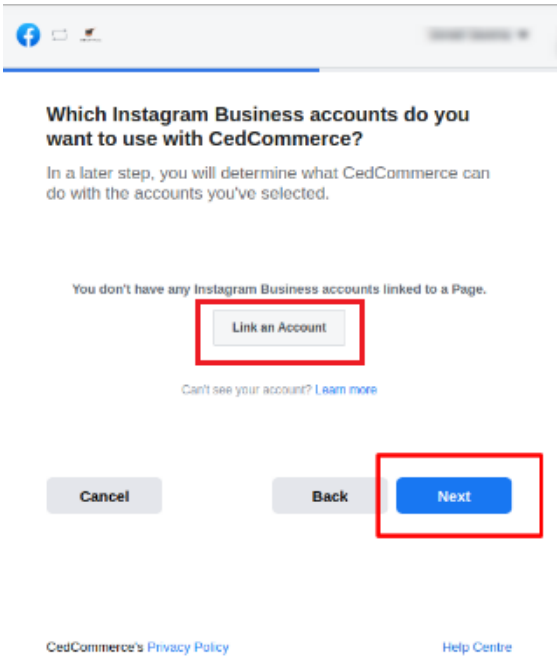
3.2.1.6. Connect to Instagram Shopping

If you want to sell on Instagram Shopping; you need to connect your Instagram Business account with a Facebook business page and CedCommerce.

It is a one-click process where you will have to **connect your Instagram Business or Creator Account** with

your Commerce Store's **Facebook Page** and **CedCommerce API.**

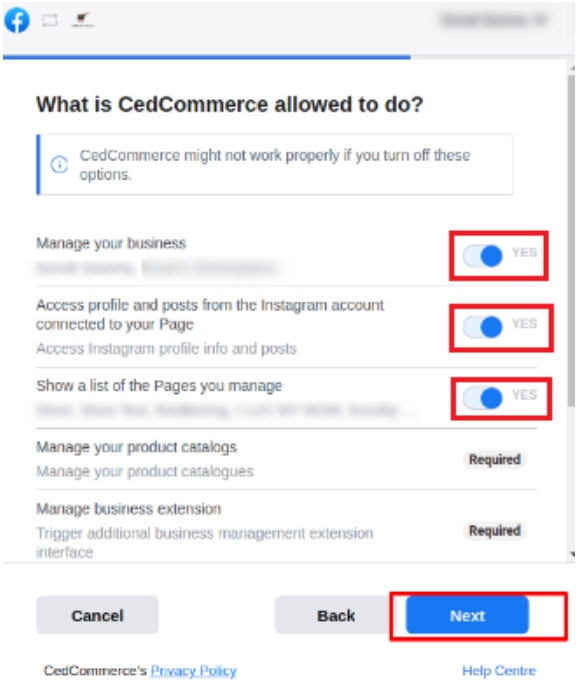
Please follow the process as displayed below, click on **"Link an Account"** and thereafter on the **"Next"** button.



3.2.1.7. Allow Permission to CedCommerce

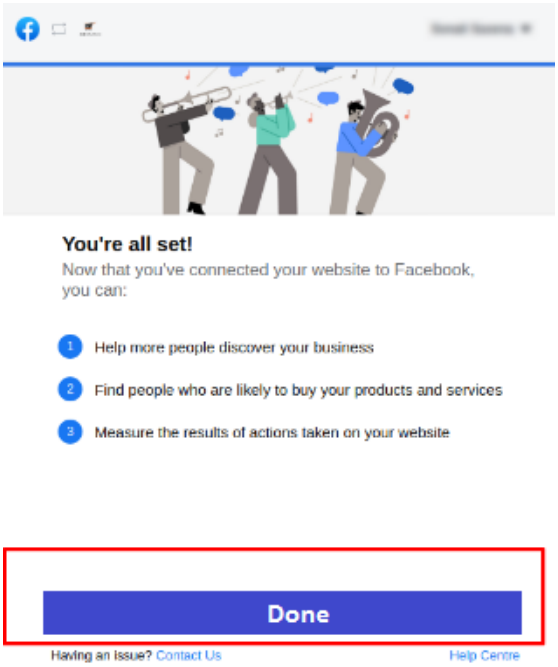
This section deals with what permissions you allow CedCommerce with. Select Yes to all permissions to run ads, Shops and gain insights into all your business activities.

You need to **allow permissions to CedCommerce API** by clicking **toggle (select) to "Yes**" against each permission. Thereafter, **click on "Next"** as displayed below:

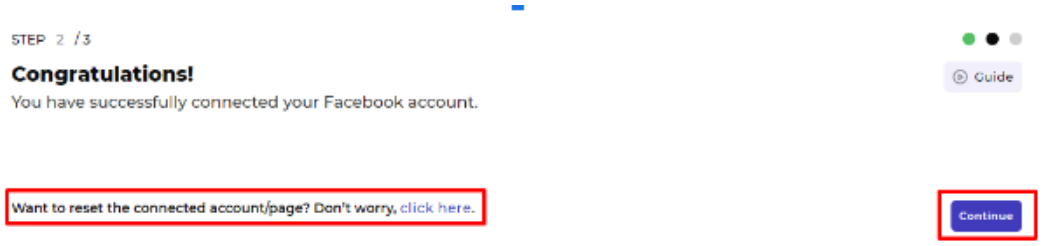


Note: You need to **grant all the permissions** (as listed) to CedCommerce API so that the application works properly.

This is the last step where you will have a **confirmation screen** from CedCommerce API **“You’re all set!”** To finalize it, click on **“Done”.**



In case, by mistake you connected a wrong account/page or want to re-edit, you can make the changes from the link as displayed below.



With this, you have successfully connected your assets across Facebook & Instagram. Click on **“Continue”** for Category and Attribute Mapping.

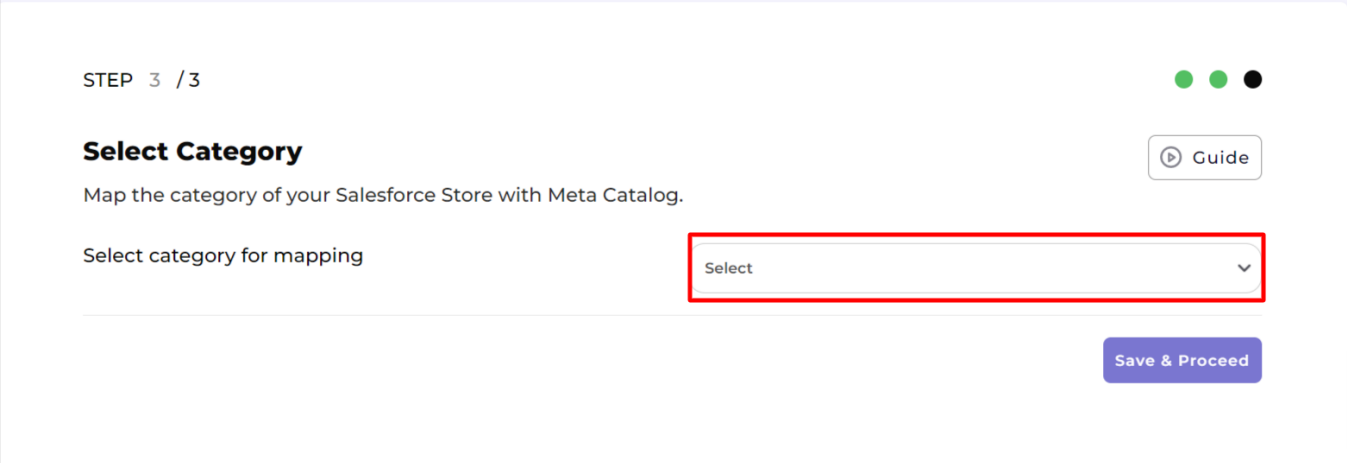
3.3. Configure Category and Attribute Mapping on app

- It would be best to map **your product category listed on Salesforce Commerce Cloud with the CedCommerce app** so that the same available category can be uploaded to Facebook Catalogue.
- Select your product’s **Category under Select Category for Mapping** as displayed below.
- After that, in **Select Attribute(s)**, map at least one attribute corresponding to each product and then **click on Save & Proceed.**
- Attribute Mapping is an ultimate process in which you provide additional details (variants) of your product like age, gender, size, pattern, etc.

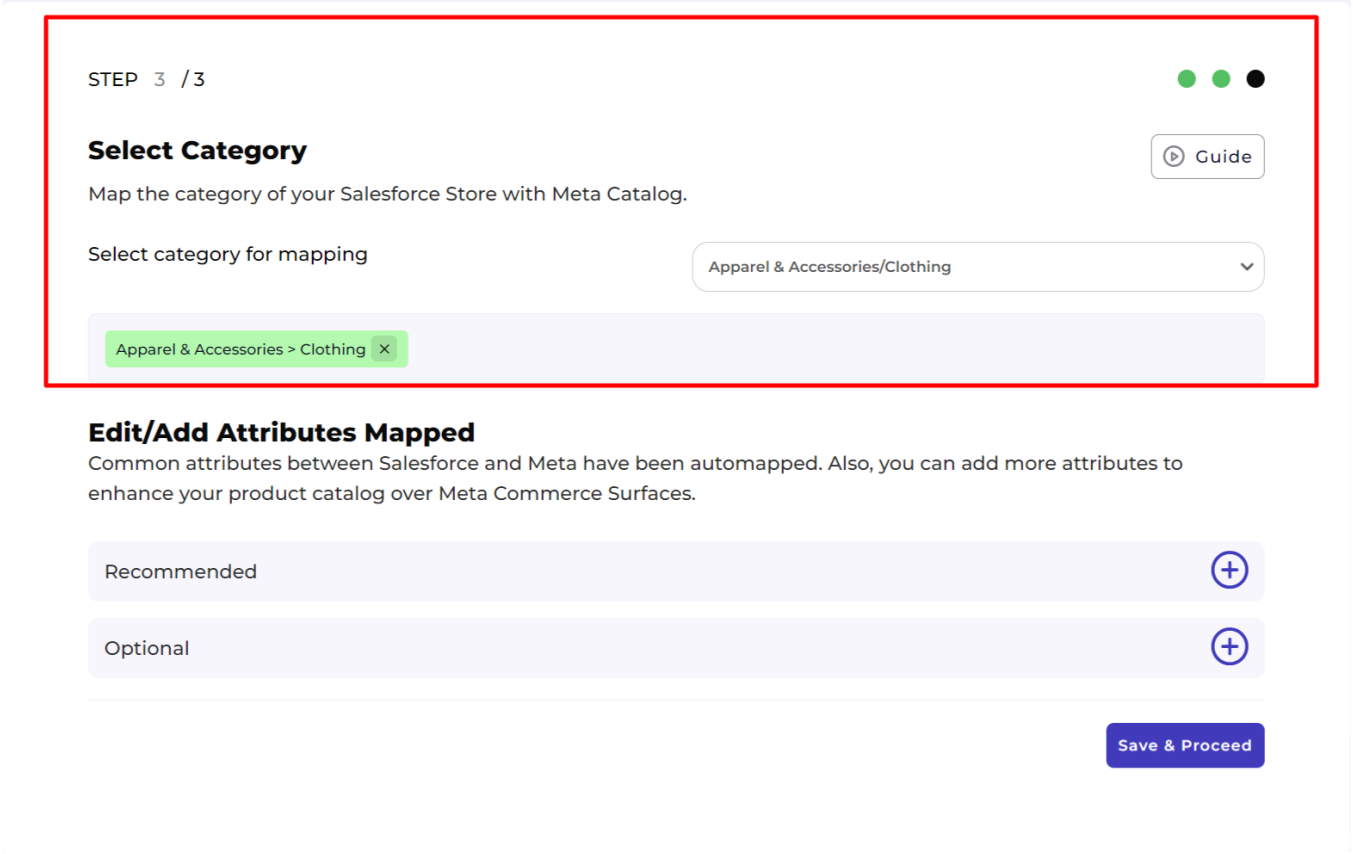
It **enhances the visibility of your product catalog** among the shoppers (they can shop using filters plus recommendations) across Facebook and Instagram.

Step 1

Under Select Category, click on **“Select”** and **choose your category from the drop-down.**

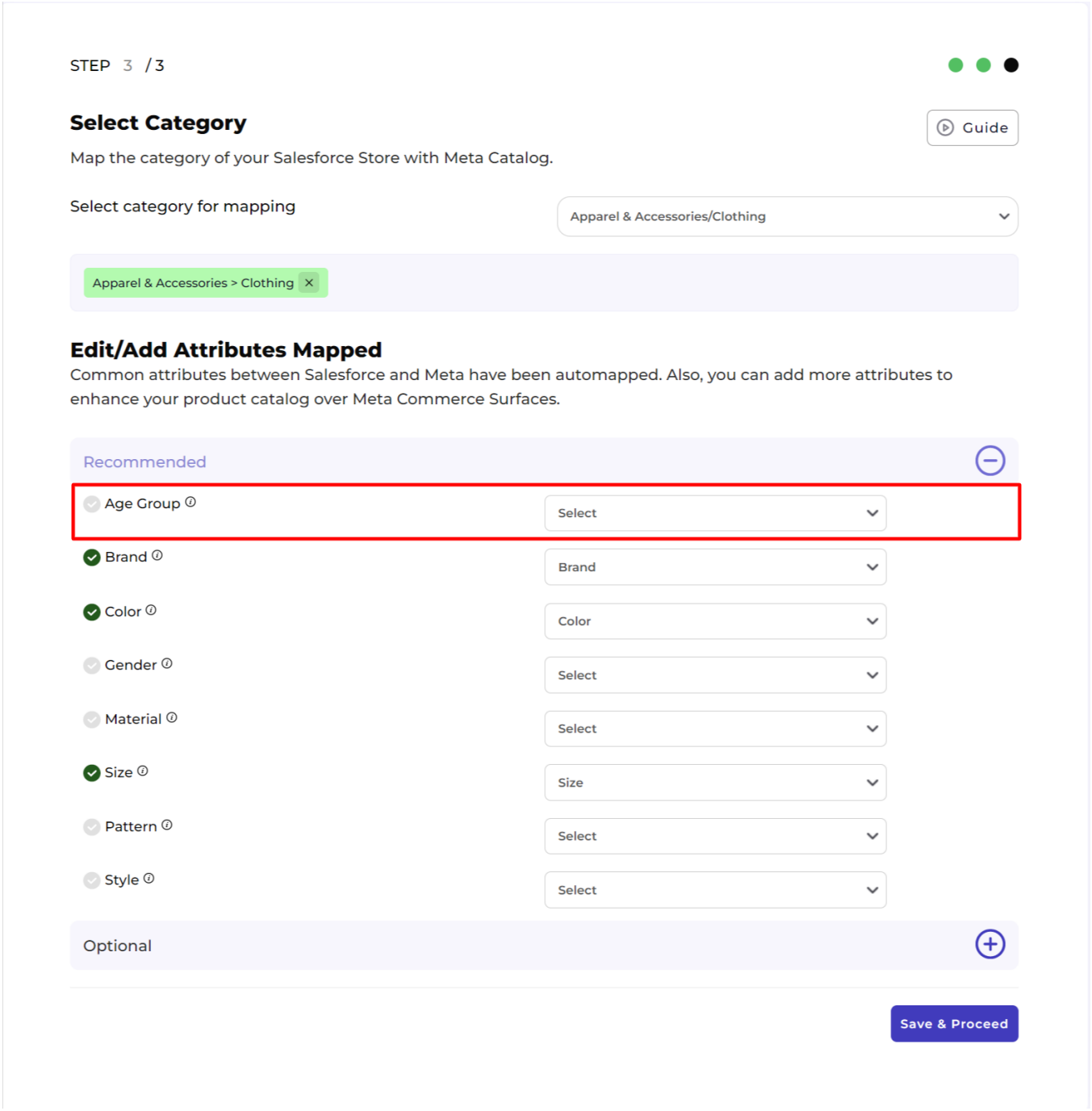


Please refer to the sample shown below:



Step 2

Further, click on the **“Save & Proceed”** button below.

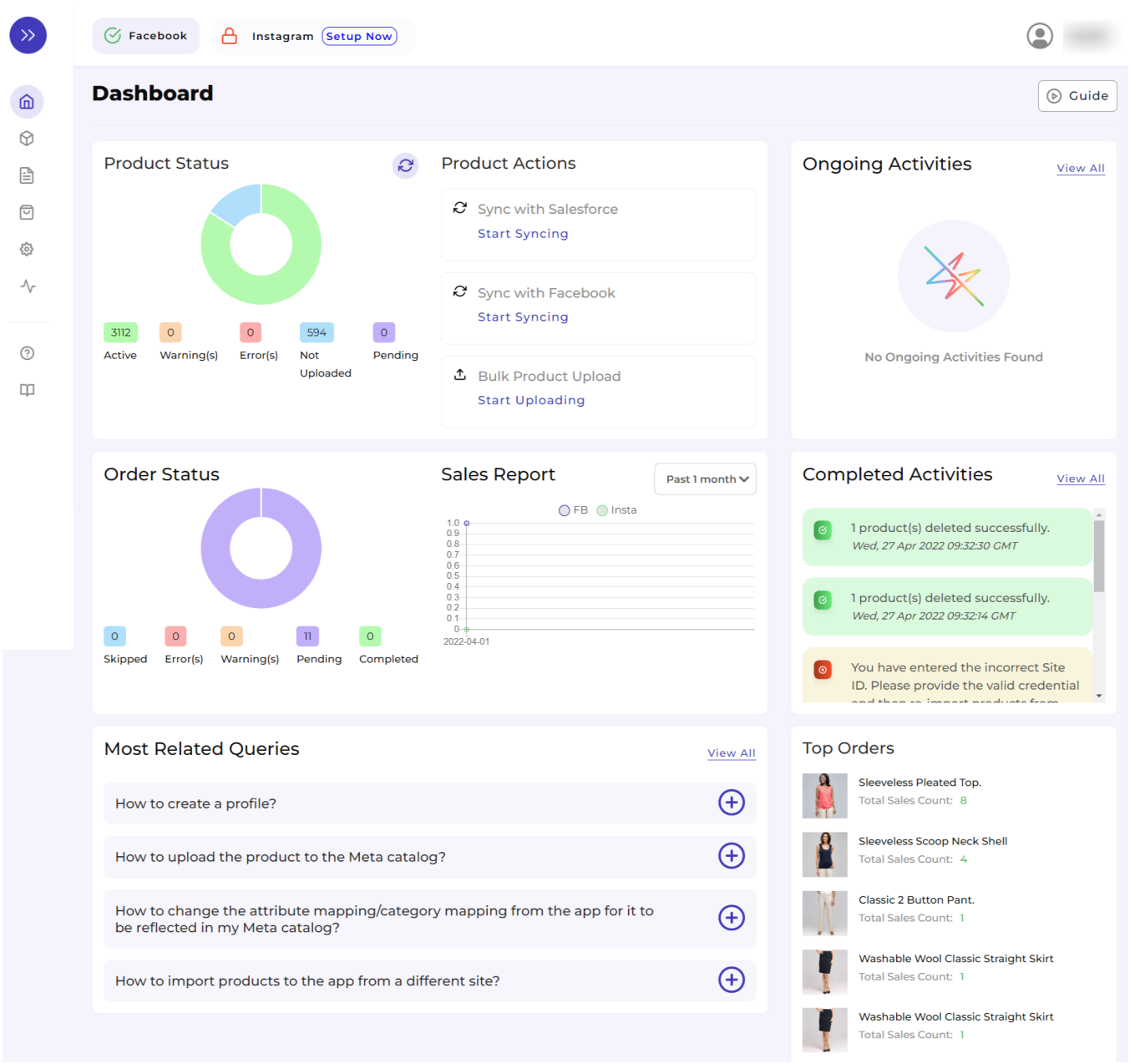


Once you are done with it, CedCommerce App will automatically initiate **product importing** (and synchronization) from Salesforce in the backend.

With this, we are **successfully done with the complete onboarding process.**

4. Dashboard

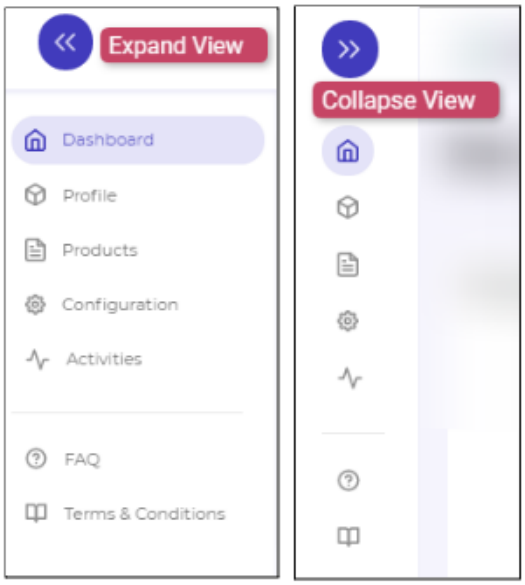
As shown below, the app's dashboard showcases the holistic view of all the merchant operations, synchronized with Facebook & Instagram Shops.



Let’s understand each block from top to bottom:

Header View:

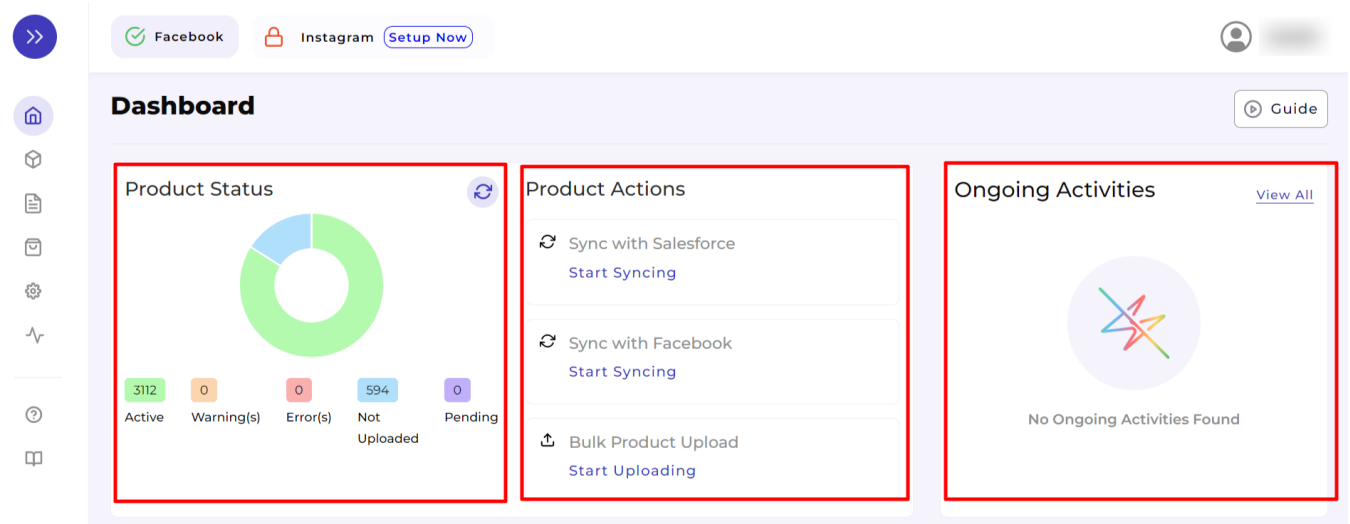
- With this icon, you can expand/collapse the left bar view as per your requirement and convenience.



(Left Bar View)

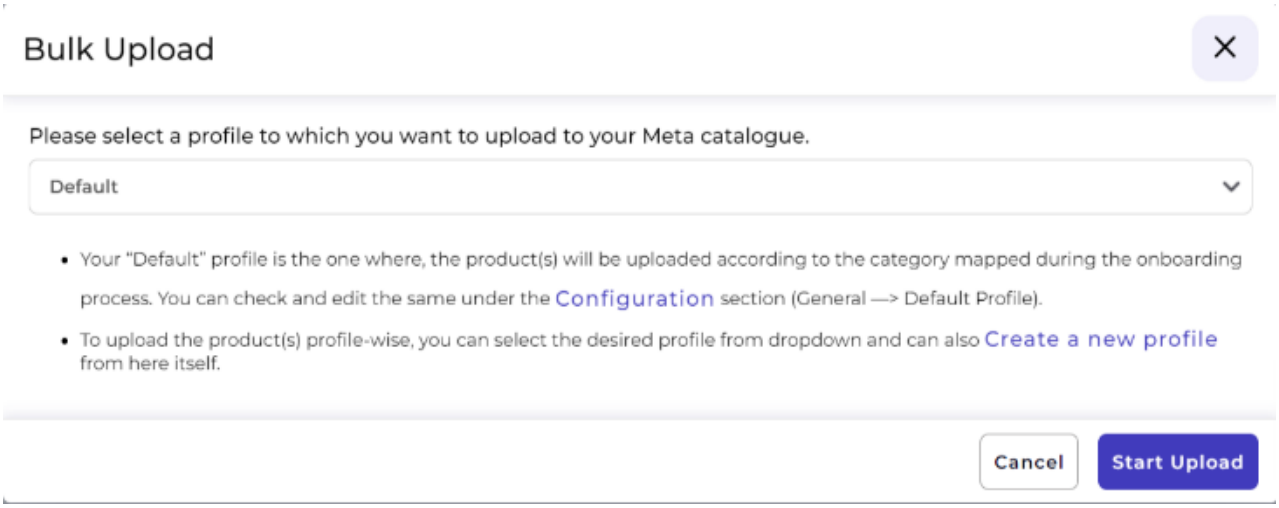
- You can hassle-free set up your Facebook and (or) Instagram Shops from here.
- It displays your Profile Name.
- This is the CedCommerce Support Chatbox available at your service 24X7.

Dashboard Middle View:



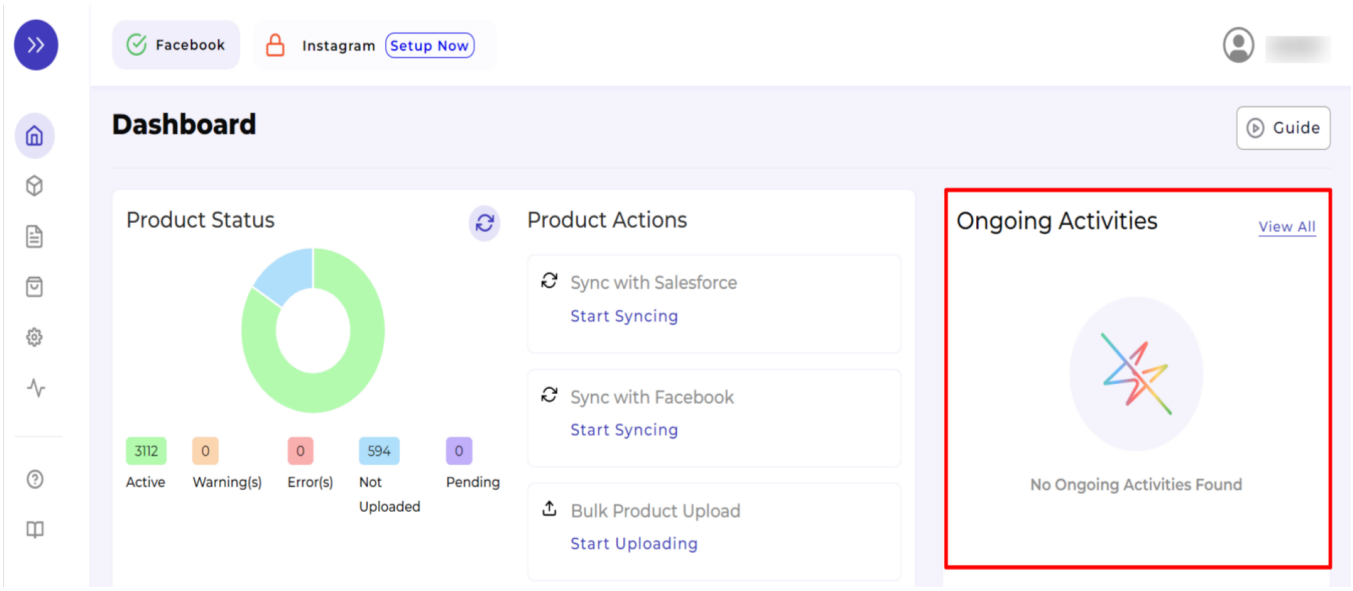
- **Product Status:** It shows the real-time status of your products imported from the Salesforce Commerce Store or uploaded from the CedCommerce App to the Meta Catalogue.
- **Sync Products**
  - **Sync with Salesforce:** You can sync products from Salesforce Commerce Store to the CedCommerce app in one click.
  - **Sync with Facebook:** This syncs the real-time status of the products (i.e., Error, Not Uploaded, Warning, and Finished) between the CedCommerce app and Meta catalogue.

- **Bulk Product Upload:** You can bulk upload the products from here.



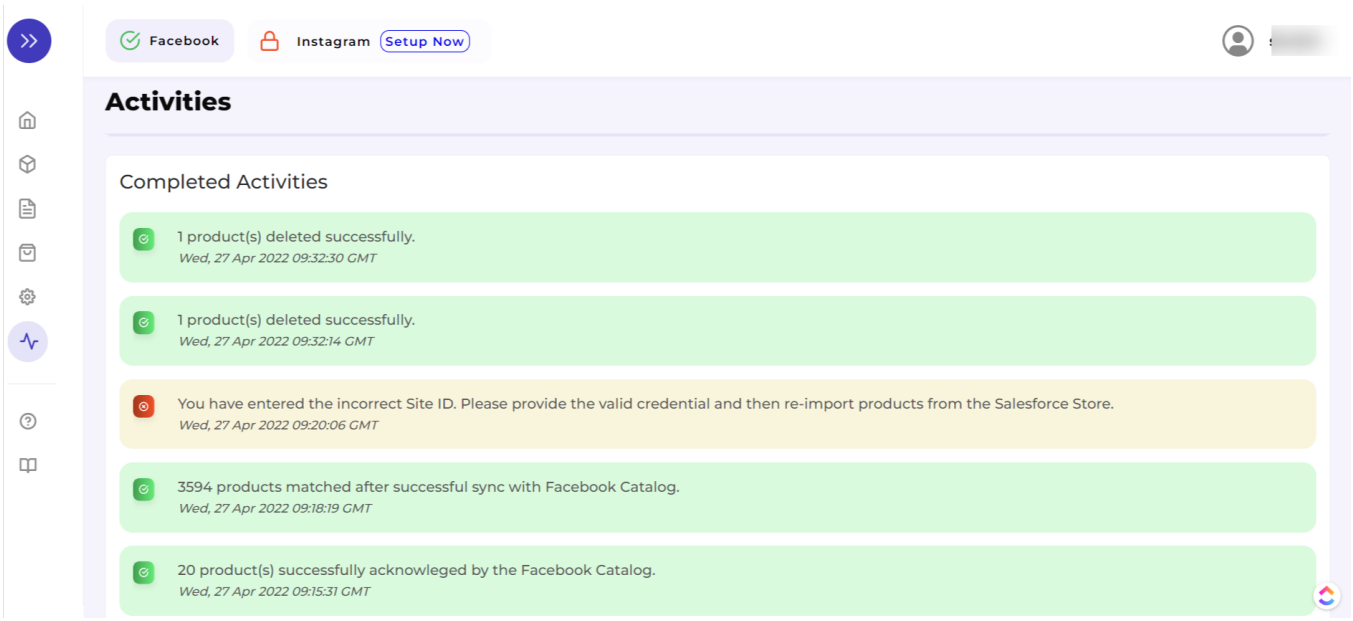
If you want to upload the products profile-wise, that is also feasible from here itself. You need to select the profile created for the product set you wish to upload and click on **"Start Upload"** (refer below to the screenshot).

- **Guide** – It allows you to access the complete video help guide, with which you can learn the complete working of the app.
- **Ongoing Activities:** It shows the real-time progress of your recent operations, as displayed in the below screenshot.

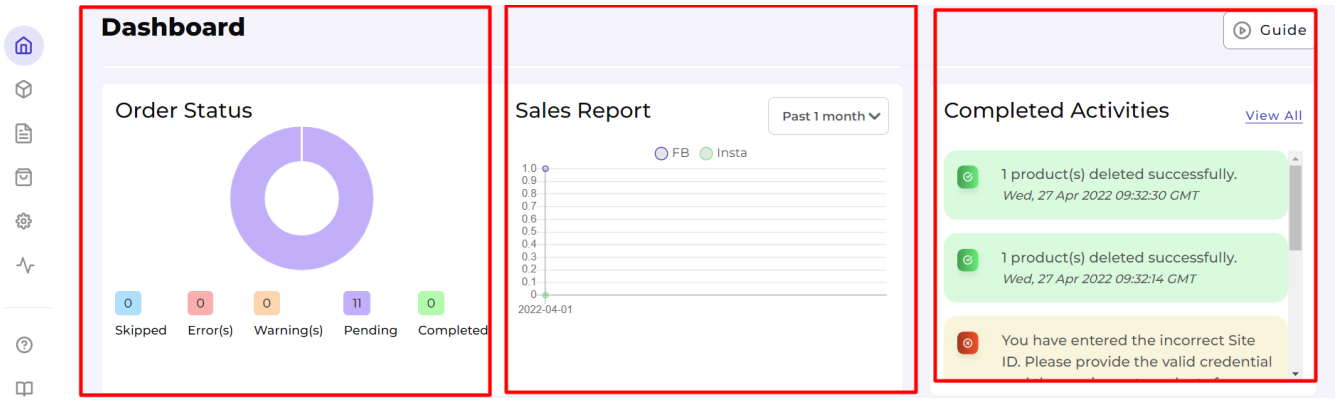


What is "View All" – If you have performed multiple operations at a time or want to view the operations performed so far, you can view it from here.

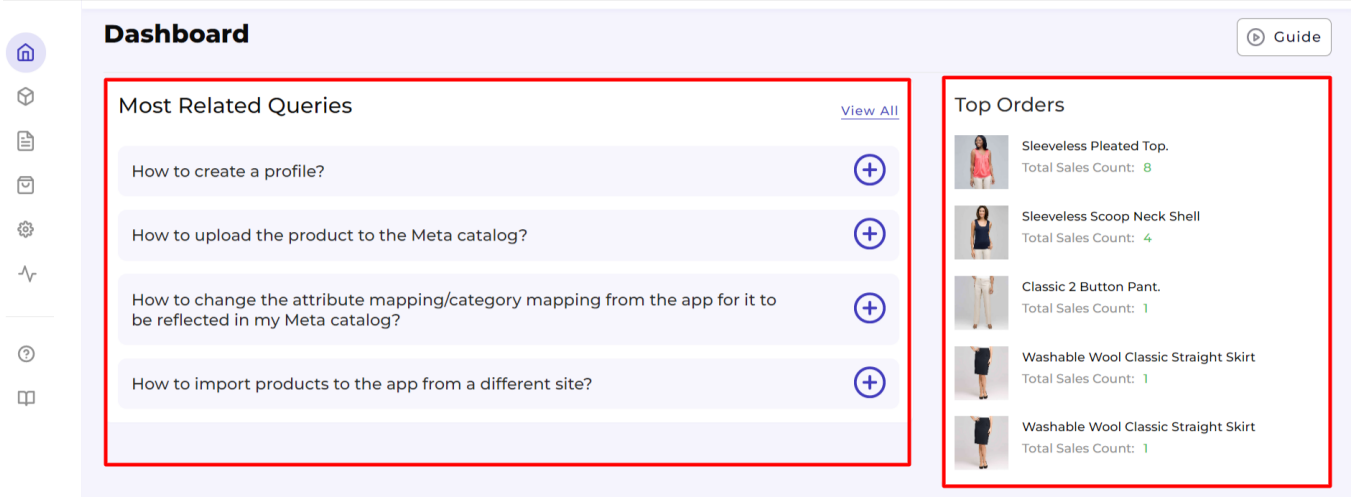
You will be redirected to the **"Activities,"** as displayed below:



- **Order status**: Keep a real-time record of the orders received, sync it between Salesforce and Facebook, and Instagram Shop.
- **Sales report**: Get a complete overview of your sales progress on your Facebook and Instagram shops from this section here. You can filter the report's time phase accordingly from the dropdown arrow.
- **Completed activities**: Get an overview of all the activities you've completed from this section.



Dashboard BottomView:



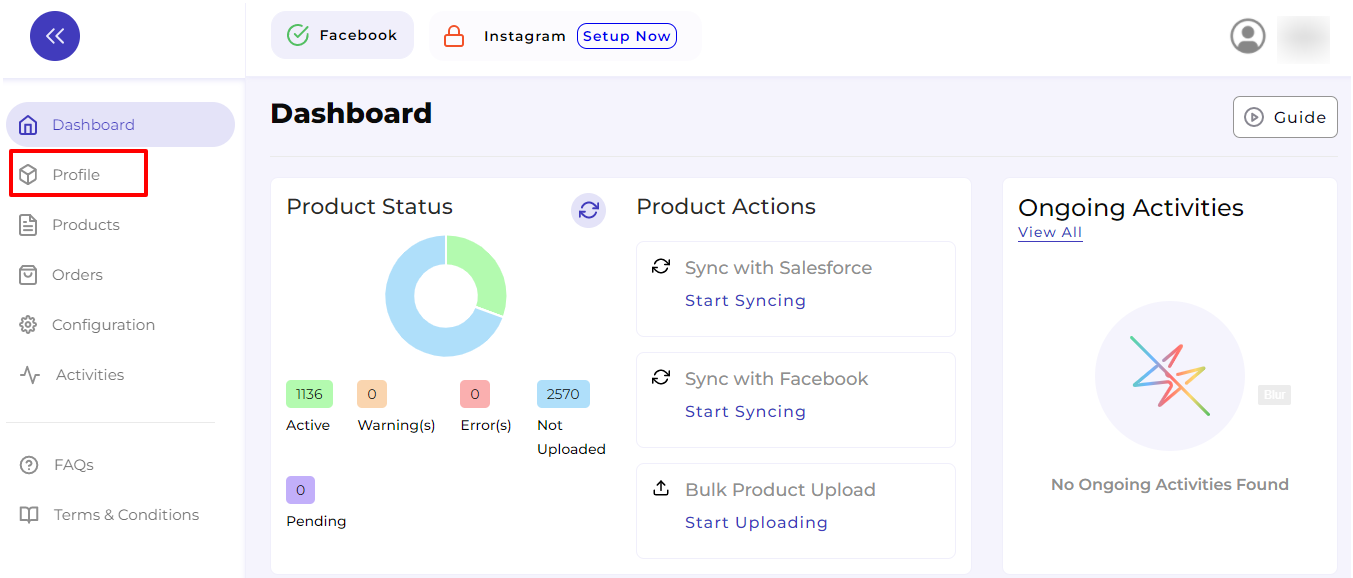
- **Most Related Queries:** It is a quick help section for sellers where the most popular and common FAQs have been answered with explanations and guides. You can **"View All"** to have the list of all answered FAQs.
- **Top orders:** It is a quick overview of your most ordered products.

5. Profile Tab

Profiling is all about creating a category of a similar product set or is created on the basis of the particular template or conditions for several products in which you wish to upload them.

By such refined categorizations, profiling not only saves time in performing multiple operations on a particular product set but also **makes the process easier while uploading the products.**

- Click on the **"Profile"** Tab as displayed below.



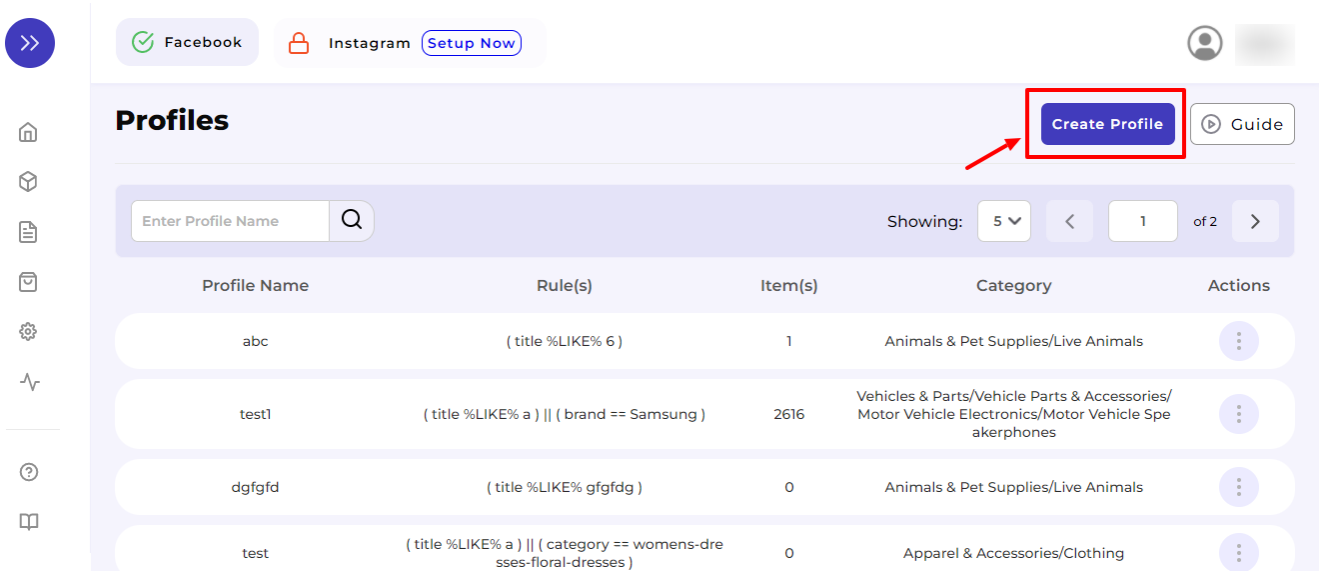
- You will be redirected to the **Profile page** wherein you will find the complete list of profiles created. And

also, you can even create a new profile from there.

5.1. How to Create a Profile?

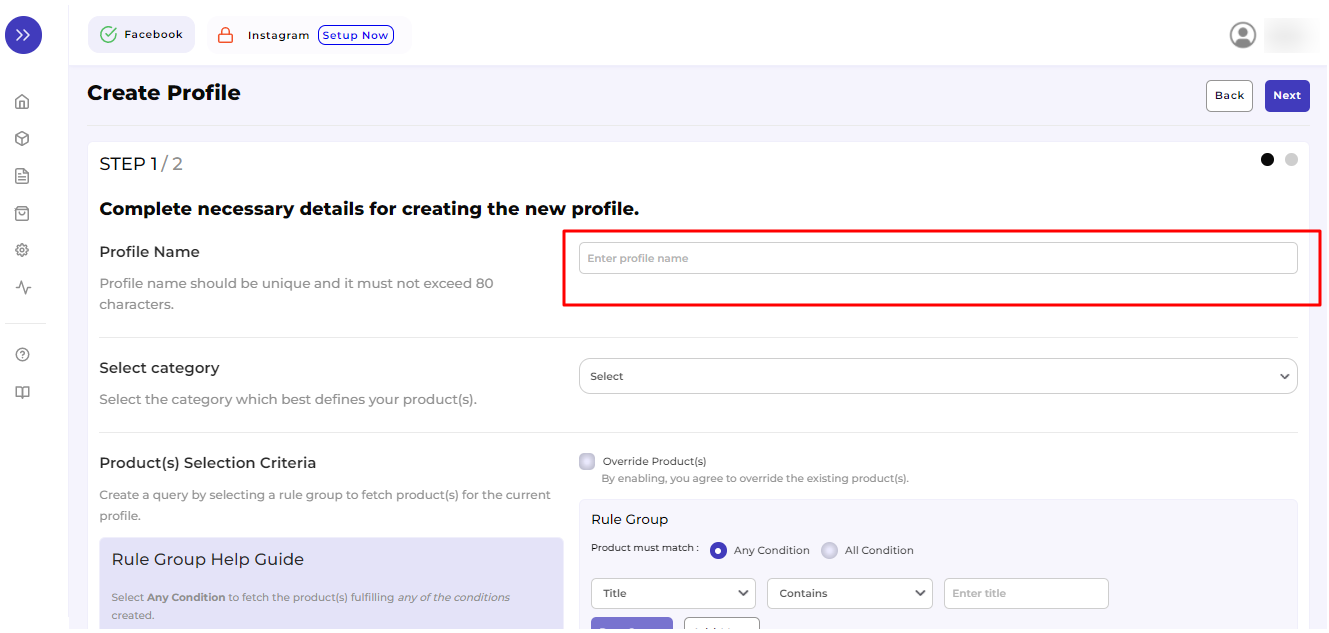
Step 1:

Click on **“Create Profile”** as shown below:



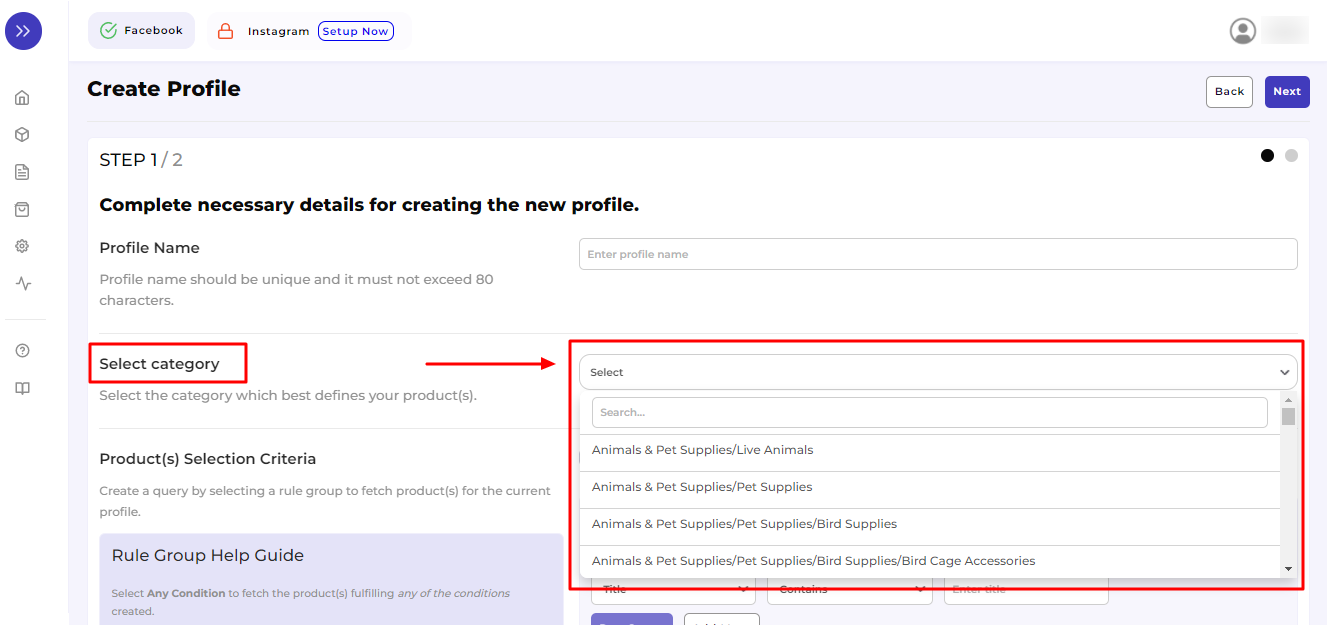
Step 2:

You will be redirected to the creation page where you will need first to Enter “**Profile Name”** (remember every profile name has to be a unique name) and **perform Category Mapping** as shown below.



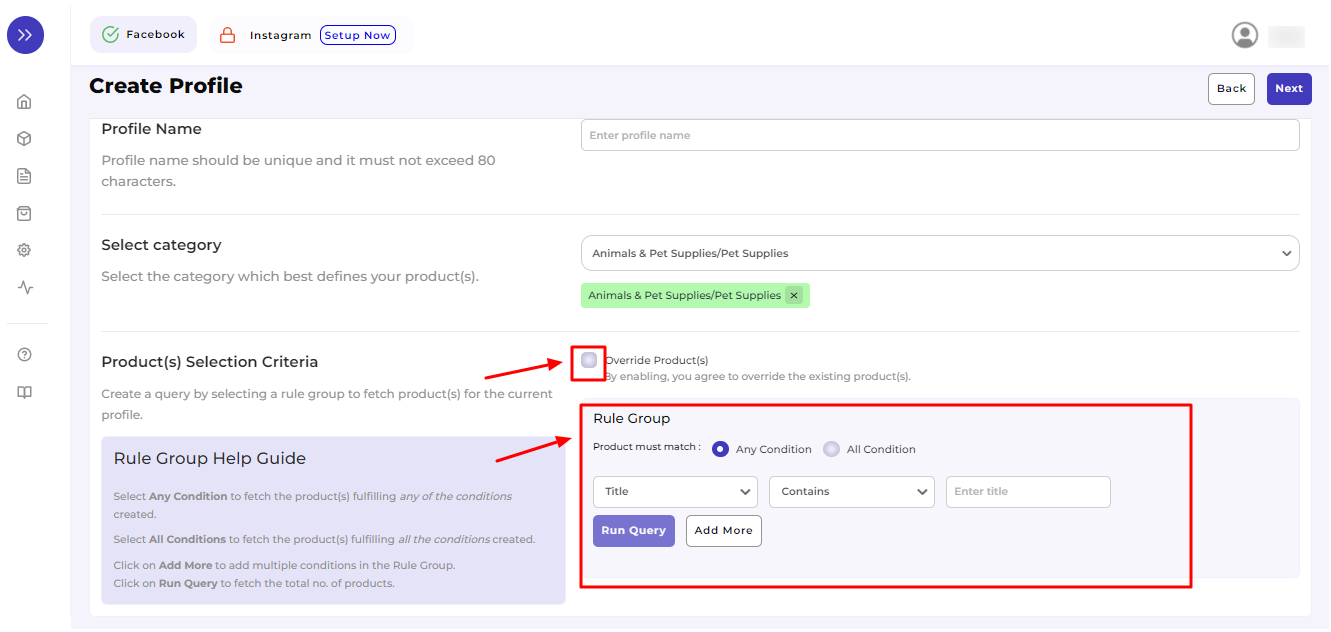
Step 3:

Select category from the drop-down as shown below with sample:



Step 4:

For your convenience, we are **attaching a sample** of the same:



Step 5:

Further, you need to select **“Rule”** containing conditions to select a particular product type in the Profile you are selecting.

The Rule is based on **ANY** and **ALL** conditions that define whether you want all the selected conditions or any of them to be true.

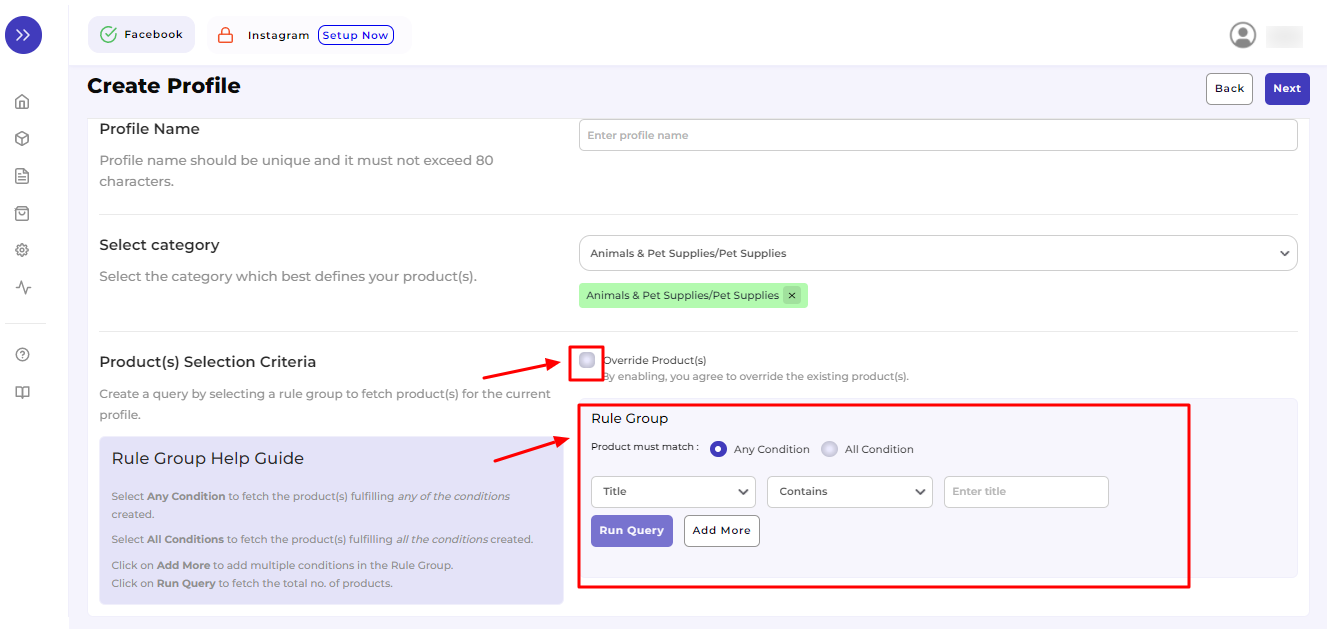
How does “Override” work?

Suppose, earlier; you have created a profile XYZ of a particular **product** set. Some of the products of profile XYZ are **mutual (common/same)** in the Profile you are creating currently, let’s say ABC.

Now, if you enable the override option, the mutual products will get removed from the XYZ profile and be linked to your **“new current”** profile ABC.

Consequently, whenever you upload the Profile ABC to the Meta Catalogue, those mutual products will automatically get updated with the details furnished under Profile ABC (not XYZ). Therefore, be cautious while executing the changes.

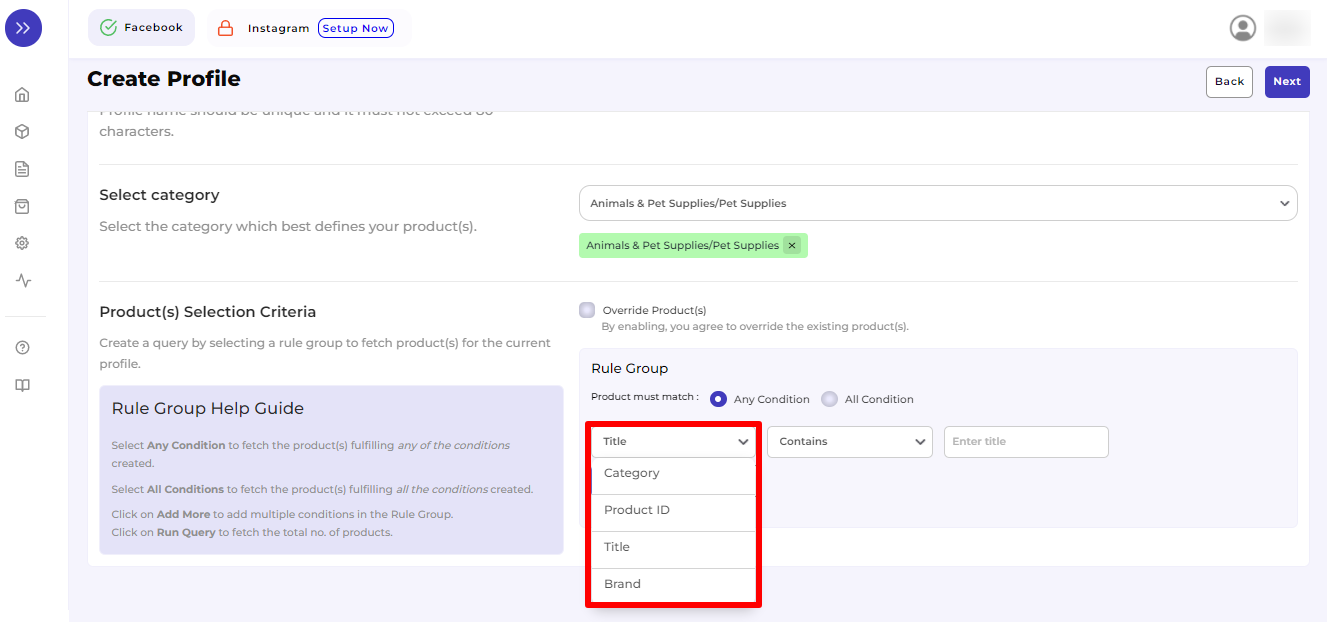
Once you are done with aligning the ruling group, click on **“Run Query”** to fetch the product details.



Step 6:

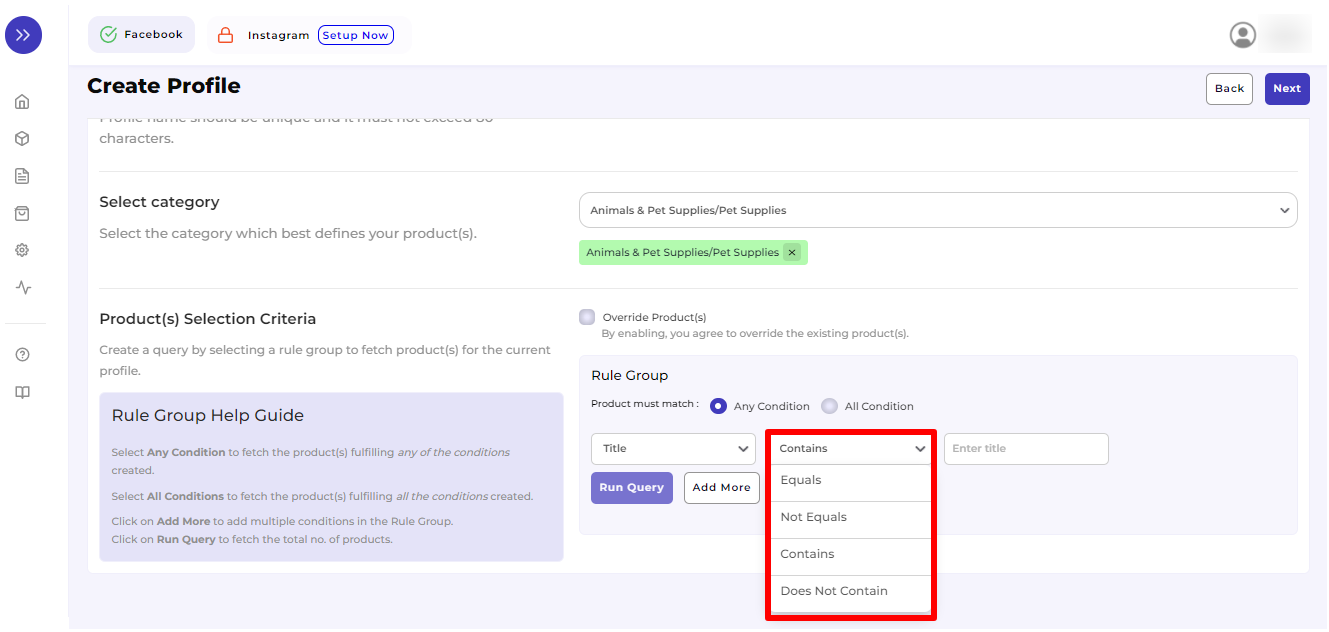
For your convenience, we have explained it through a sample below:

In the "**Rule Group**," choose from Category, Product ID, Title, and Brand.

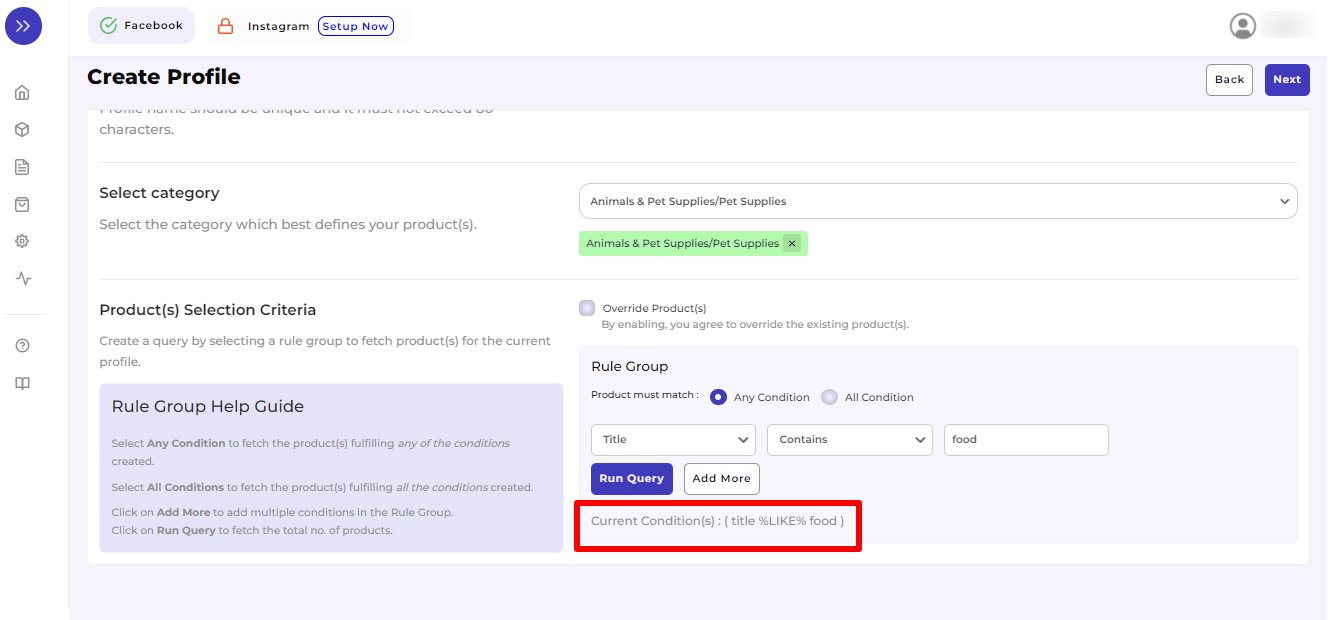


Further in the Rule Group itself, choose the Value from the following options:

- Equals
- Not Equal
- Contain
- Does Not Contain

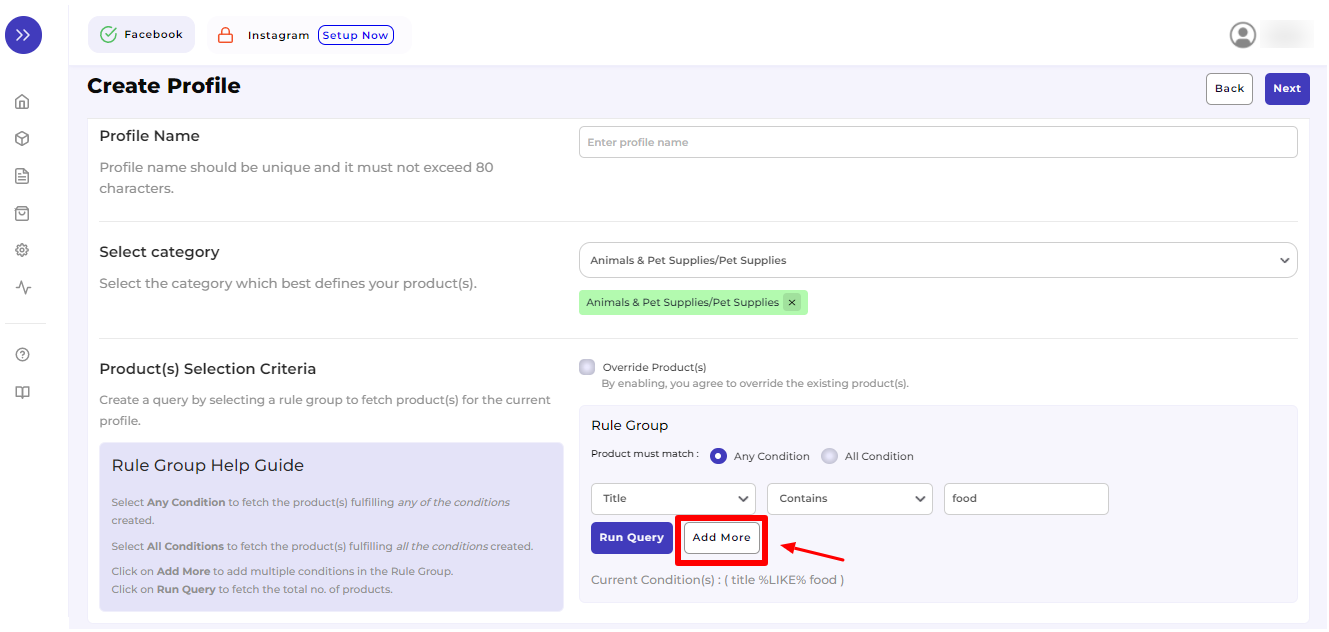


Concerning it, enter the **Filter Value** and click on "**Run Query**." Products details will be fetched as shown below. After it, you need to click on "**Next**."

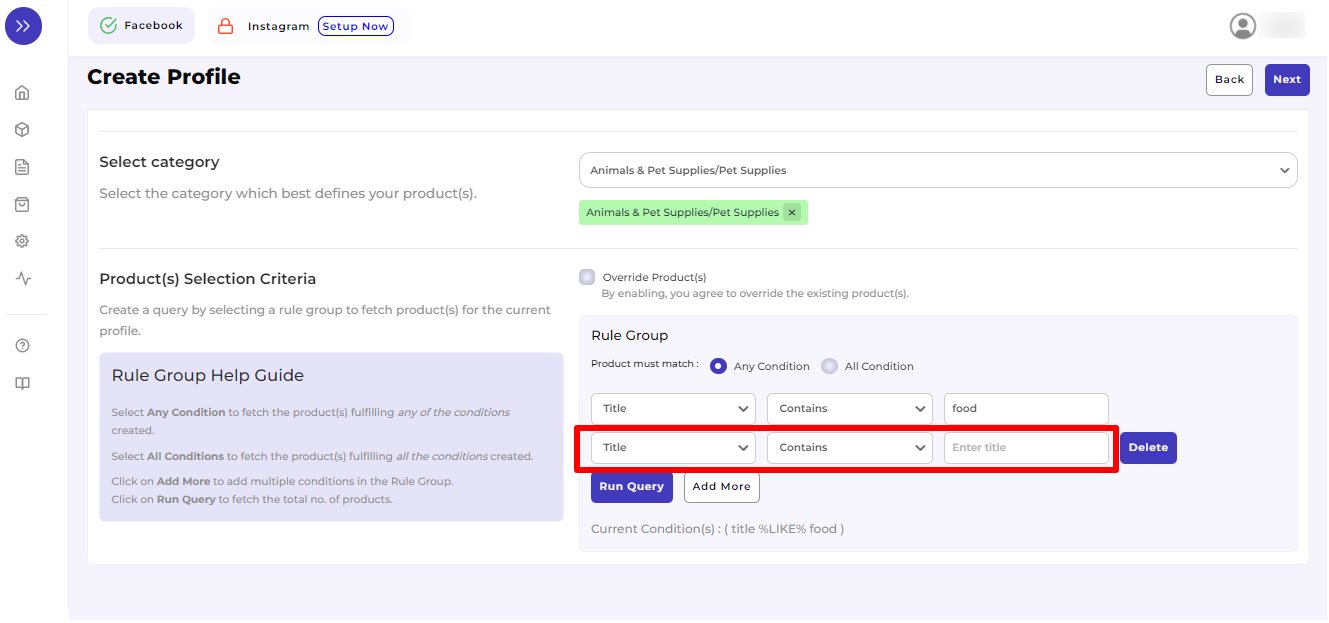


In case you want to **add more rule groups**, click on logics "**Any**" or "**ALL**" and then "**Run Query**" Let the app fetch the product details, and after that, click on "**Next**."

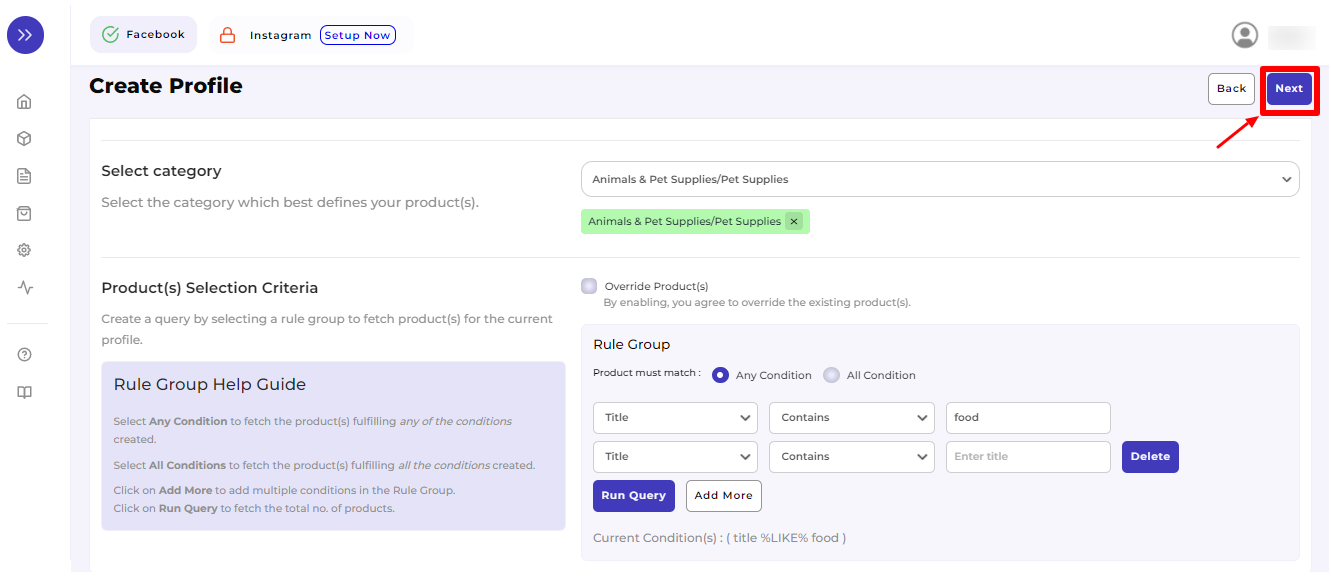
A glimpse of the same has been displayed below for better understanding:



Repeat selecting "**Rule group**" again, as done previously. Refer to the image below for a better understanding:

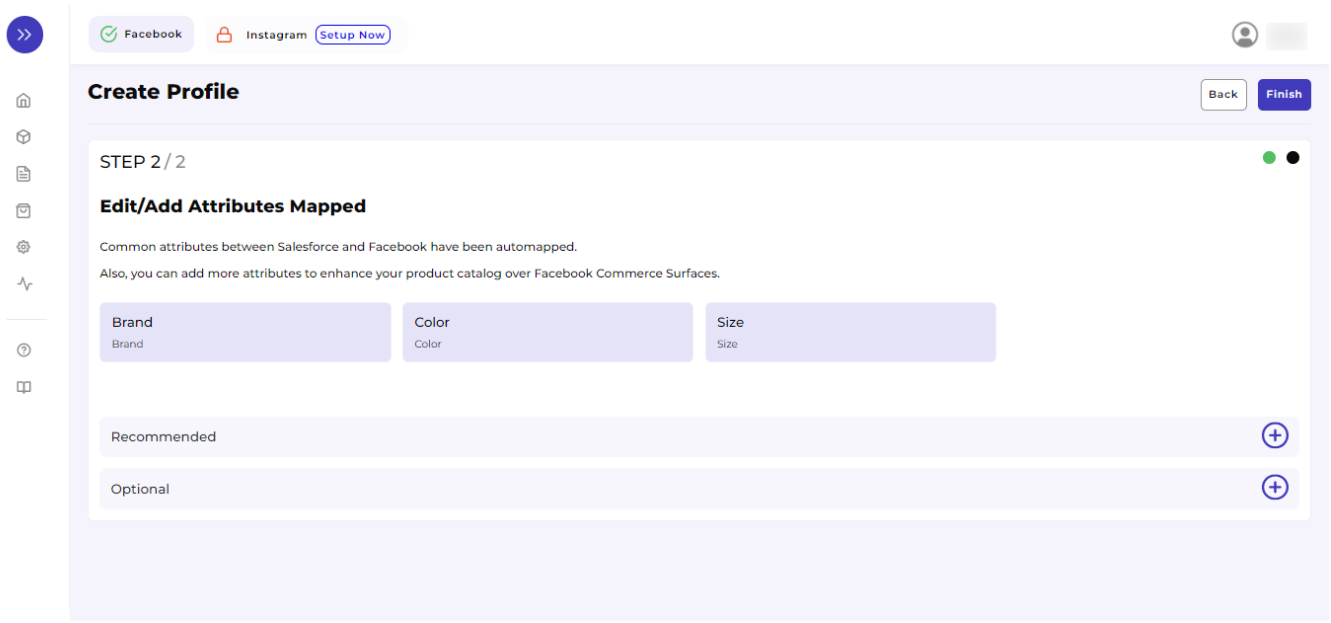


Once you complete **the basic profile creation part,** you will be redirected to the next step, **"Attribute Mapping," as guided in Step 7.**



Step 7

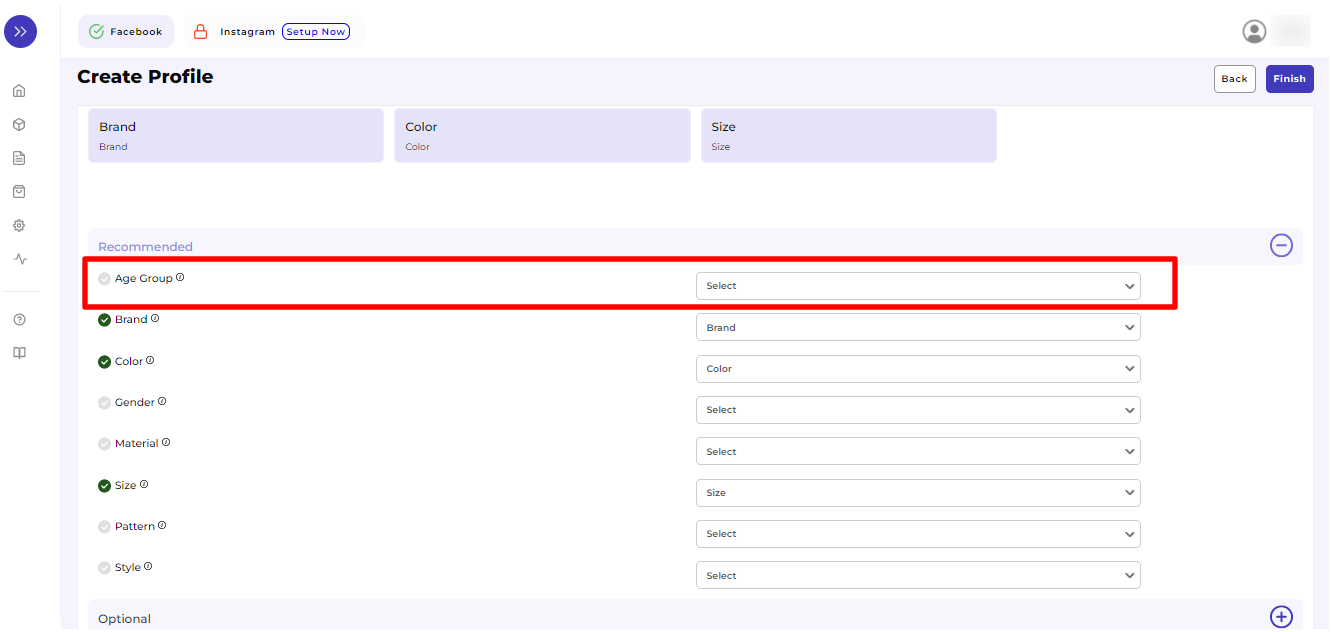
It is mandatory to **map at least one attribute per Profile** in the attribute mapping. The same can be edited any time after profile creation.



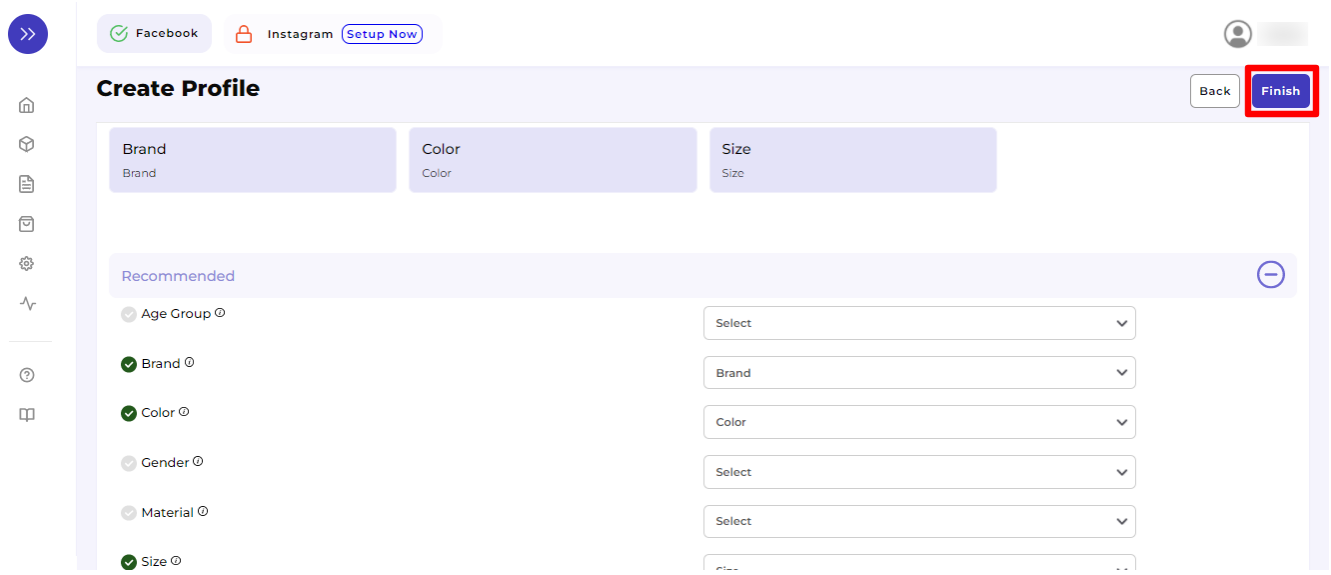
You will get “**Recommended**” and “**Optional**” options to map attributes. You are free to choose only Recommended or both of them.

In Recommended, the attribute mapping is done based on Age Group, Brand, Color, Gender, Material, Size, and Pattern Style to the category that you have selected in the previous step.

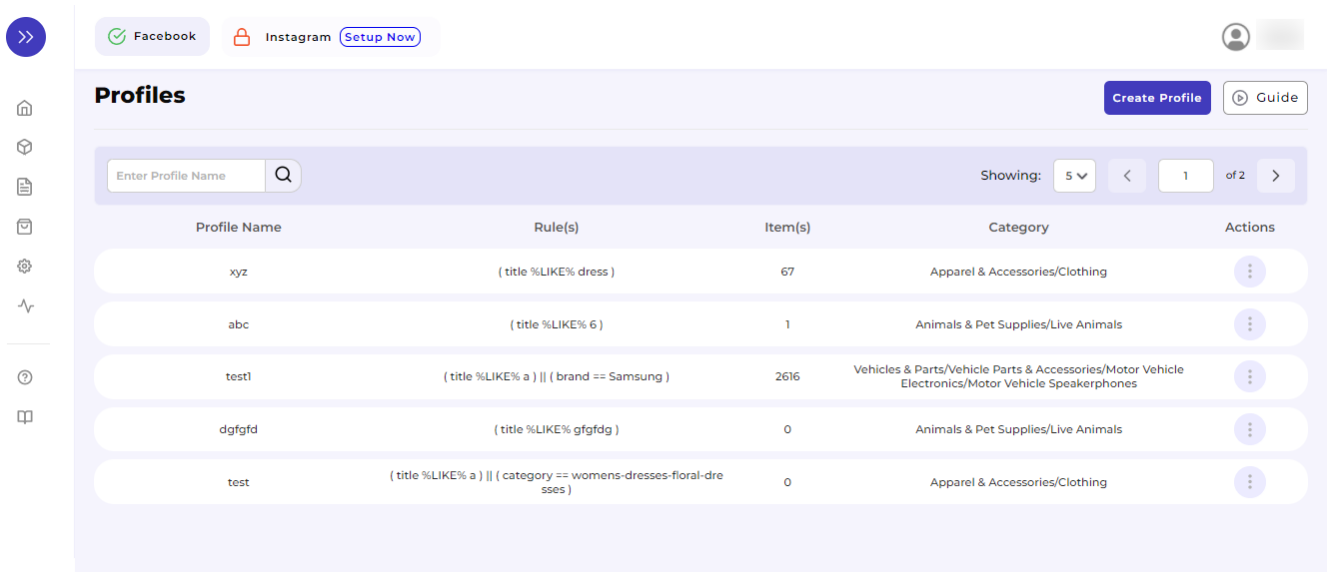
To map attributes, you just need to click + icon as shown in the snapshot.



Now, click on the "**Finish**" button to complete the process of creating a Profile.

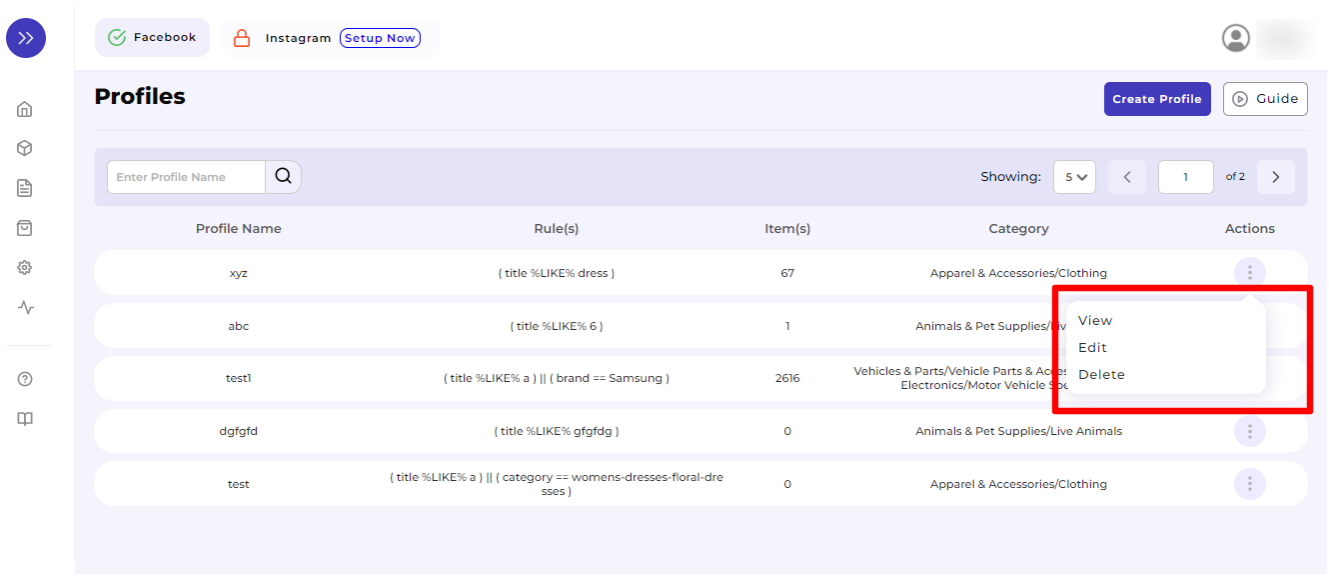


After completing Attribute Mapping, you will be prompted with the message **"Profile Created Successfully,"** and further, you will be redirected to the **"Profiling"** Page having the details of the Profile (s) created (please refer below the screenshot).



To **“View,” “Edit,” or “Delete” the Profile**, click on three dots corresponding to that particular Profile.

You will be instructed further to make the updates or deletions accordingly.

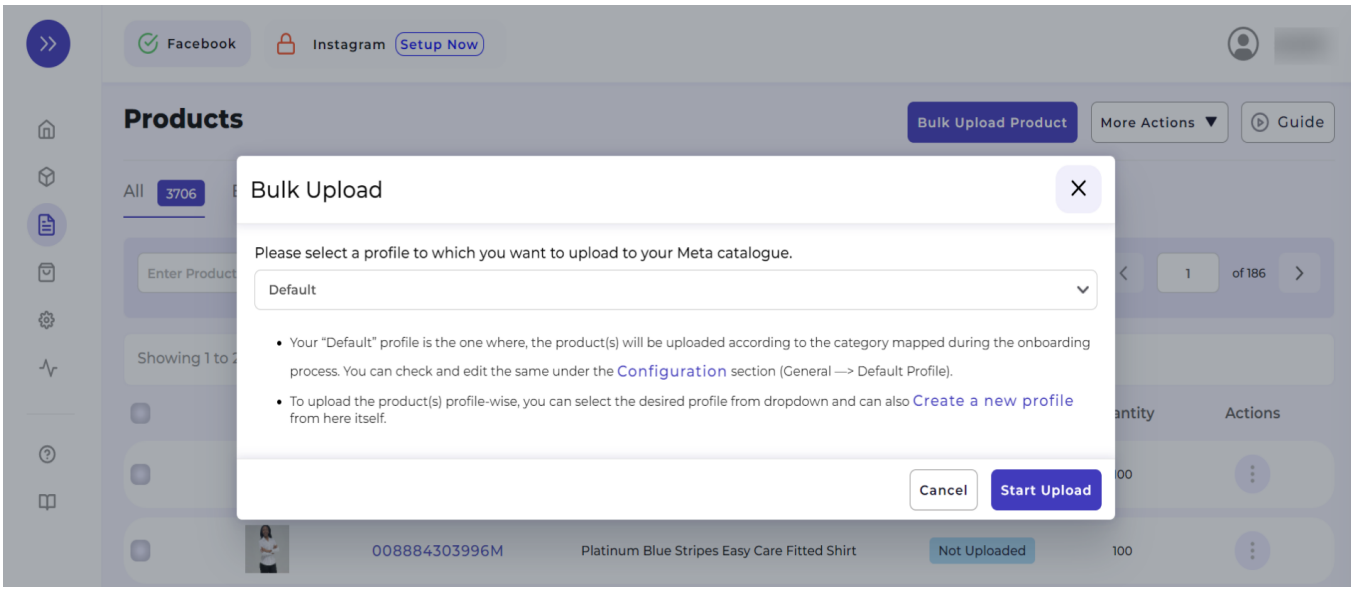


With this, we are done with the creation of a profile successfully!

5.2. How to Upload Product Profile-wise?

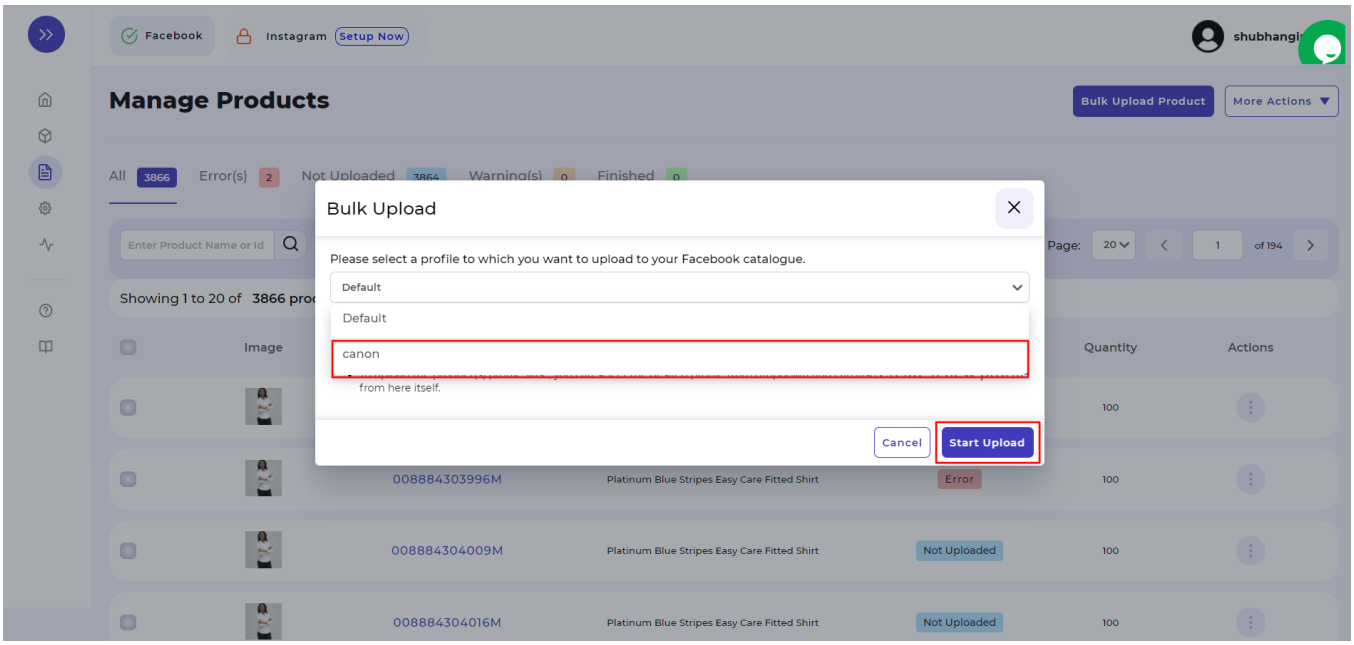
Step 1

Go to the **“Products”** Tab and click on the **“Bulk Upload Product”** button. A pop-up box will appear in front of you, click on the **drop-down menu** as shown below:



Step 2

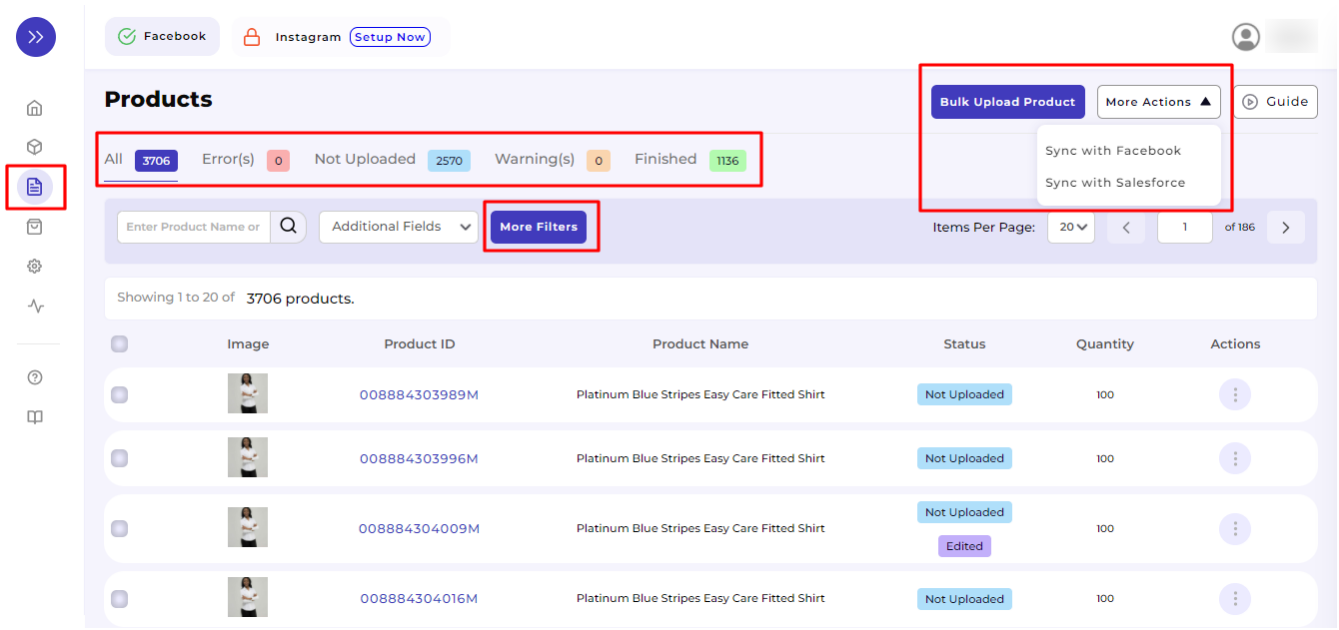
Select the profile you want to upload (as displayed below) and thereafter click on the **"Start Upload"** button.



With this, all the products (or product-set) under the profile selected will start uploading that you can view either in the **Ongoing Activities** section from Dashboard or directly from the **Activities Tab.**

6. Products Tab

This tab gives a comprehensive real-time status of the operations performed on the products. Let's understand this product management block-wise as displayed below:



Product Status

It shows the following statuses:

- **All**: Total no. of products Uploaded
- **Error(s)**: Total no. of products with errors that need to be corrected.
- **Not Uploaded**: Total no. of products imported from the Salesforce Commerce Store to the app but not uploaded in the product catalog.
- **Warning(s)**: Total no. of products with the warning that needs to be corrected.
- **Finished**: Total no. of products uploaded and are available in the product catalog.

Bulk Upload Product and More Actions

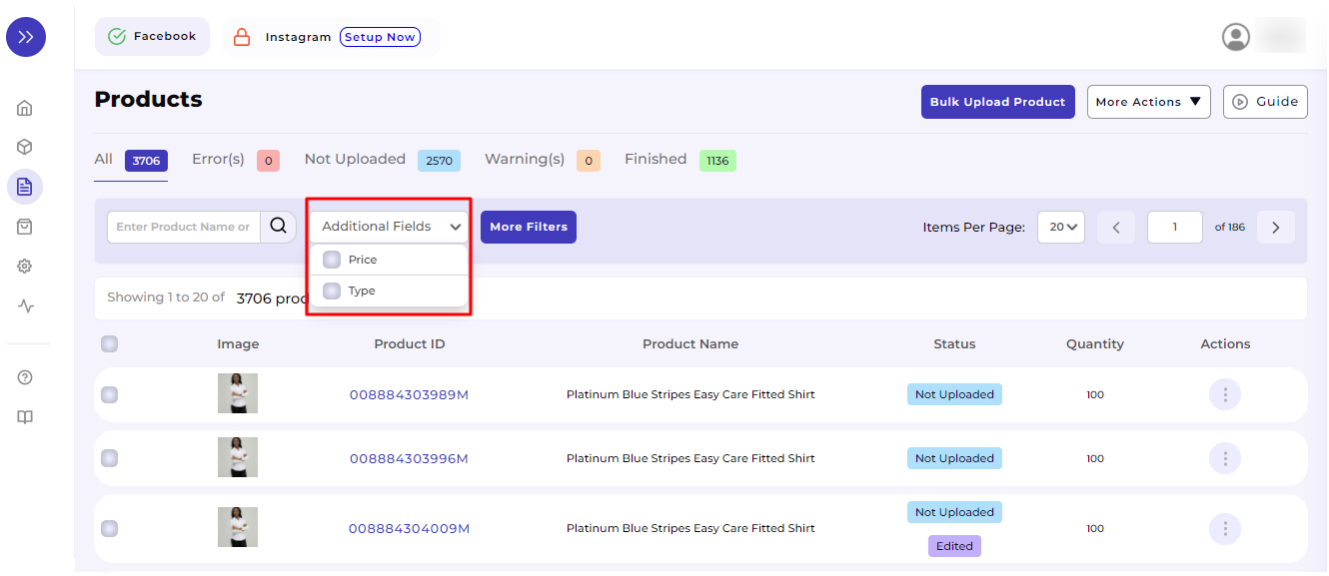
As shown in Section 5 – Dashboard, you have two options to bulk upload the products, **either with the default selection or profile-wise.**

In one click **you can sync product importing** with Salesforce or Facebook and Instagram Shops.

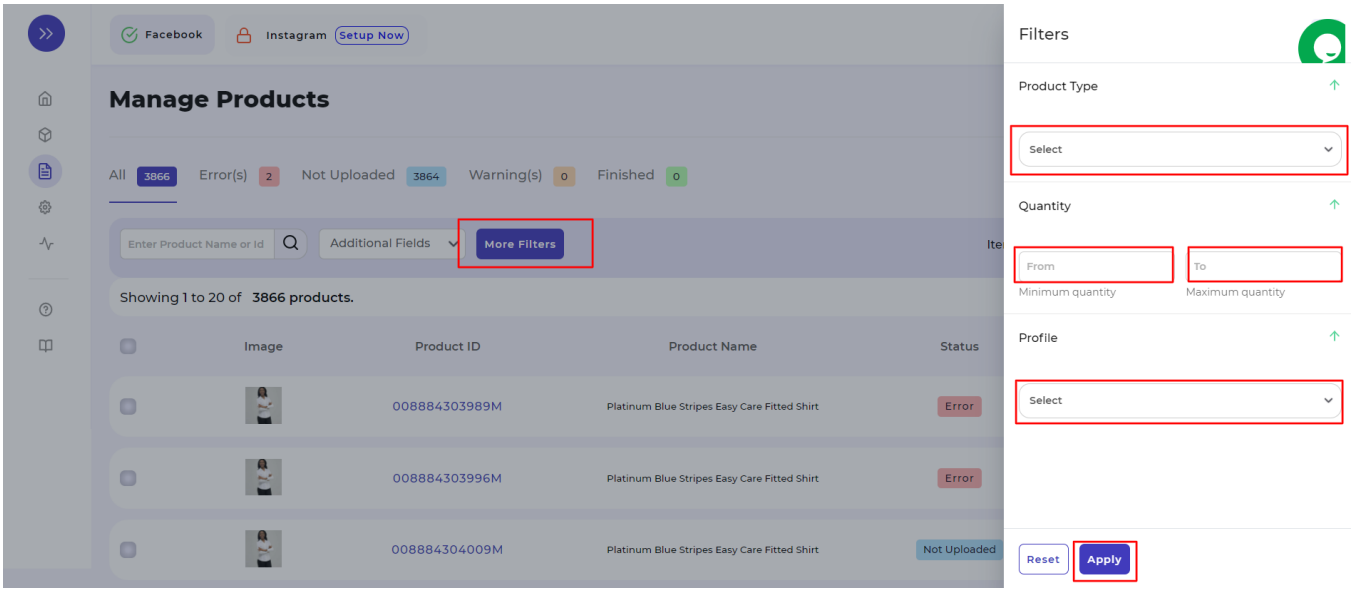
- **Sync with Salesforce:** This operation will import your products from Salesforce to the CedCommerce app.
- **Sync with Facebook:** This operation will sync the status by matching the Product IDs available on the CedCommerce App with that of the Meta Catalogue. For all the products of which the match will be found to be true, the status will be changed to **Finished** in the CedCommerce App.

More Filters

Product Type, Quantity, Source ID, and Profile are the extra filters apart from the provided **Additional Fields** (-price and type) for a more refined product search.



Select the option **“More Filters”** —> Choose the detail from a dropdown or enter the details and then click on **“Apply”.**



7. Orders Tab

With ***Orders Tab***, you can smoothly manage orders received from Meta Commerce Surfaces to your Salesforce Store. Meta *Commerce Surfaces include Facebook Marketplace, Facebook Shops, and Instagram Shopping.*

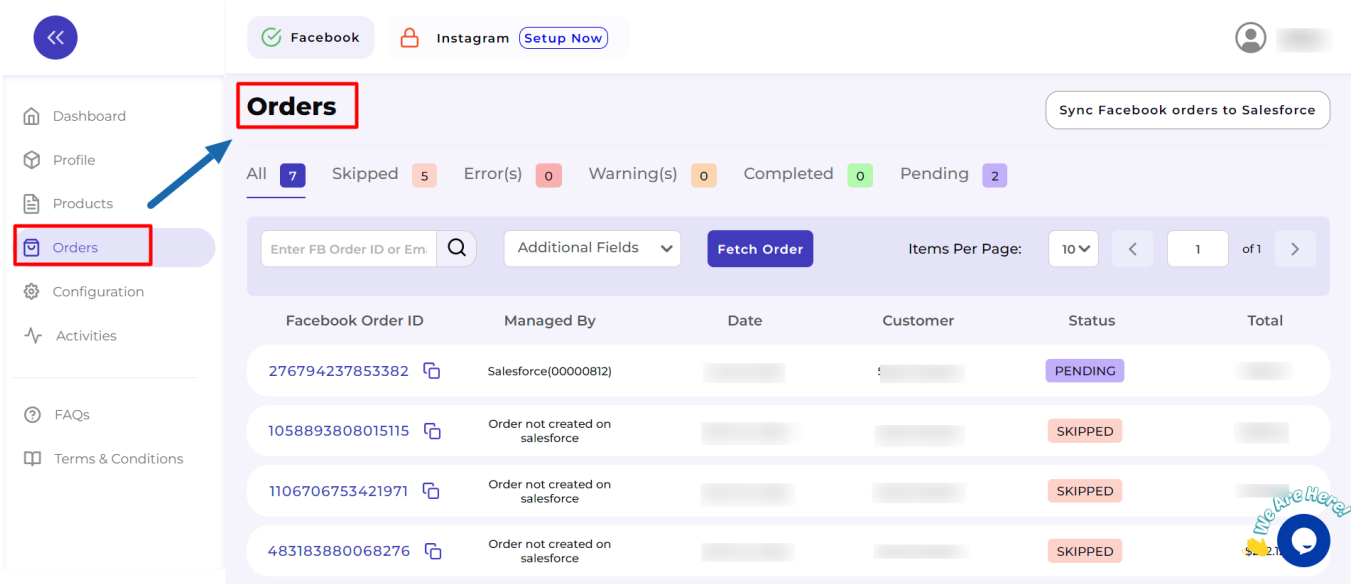
The end-to-end process of order syncing is real-time automated within the app itself.

Let’s understand what operations you can perform under order management:

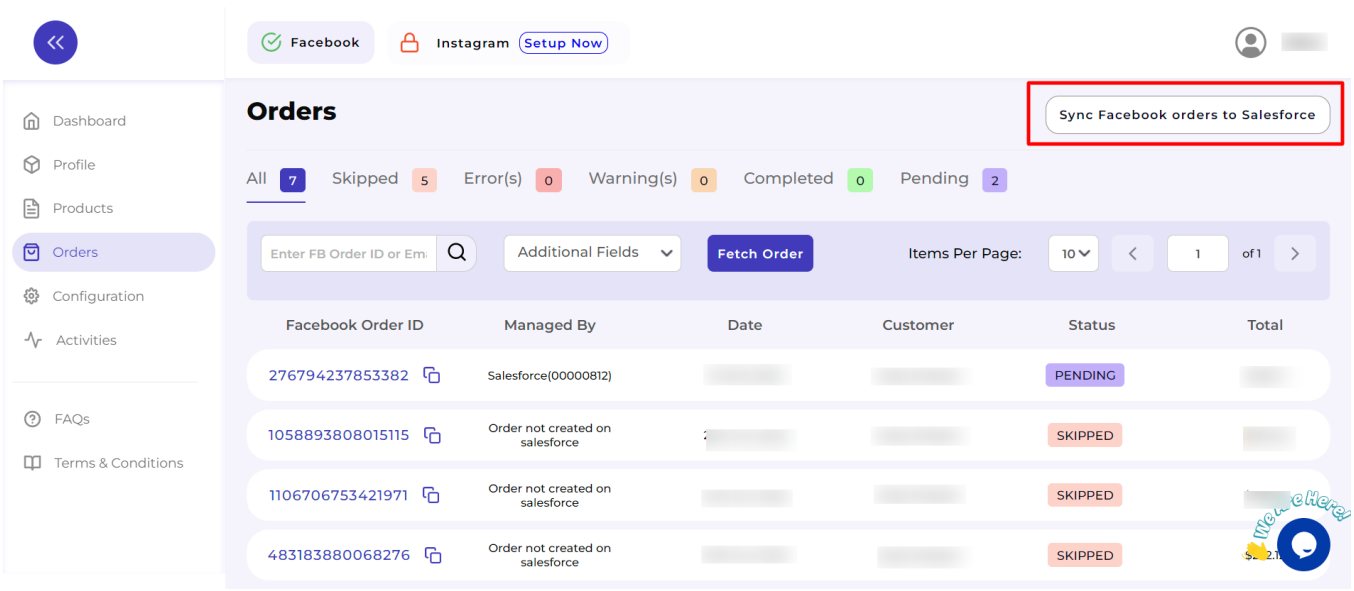
- How to sync orders from Meta Commerce Platforms to Salesforce Store?
- What are the different order statuses?
- How to search for orders?
- What are the order fields?
- What are the additional fields?
- How to fetch orders?
- What is displayed under Order Details?
- How to map skipped orders?
- How to manage pending orders?

7.1. How to sync orders from Meta Commerce Platforms to Salesforce Store?

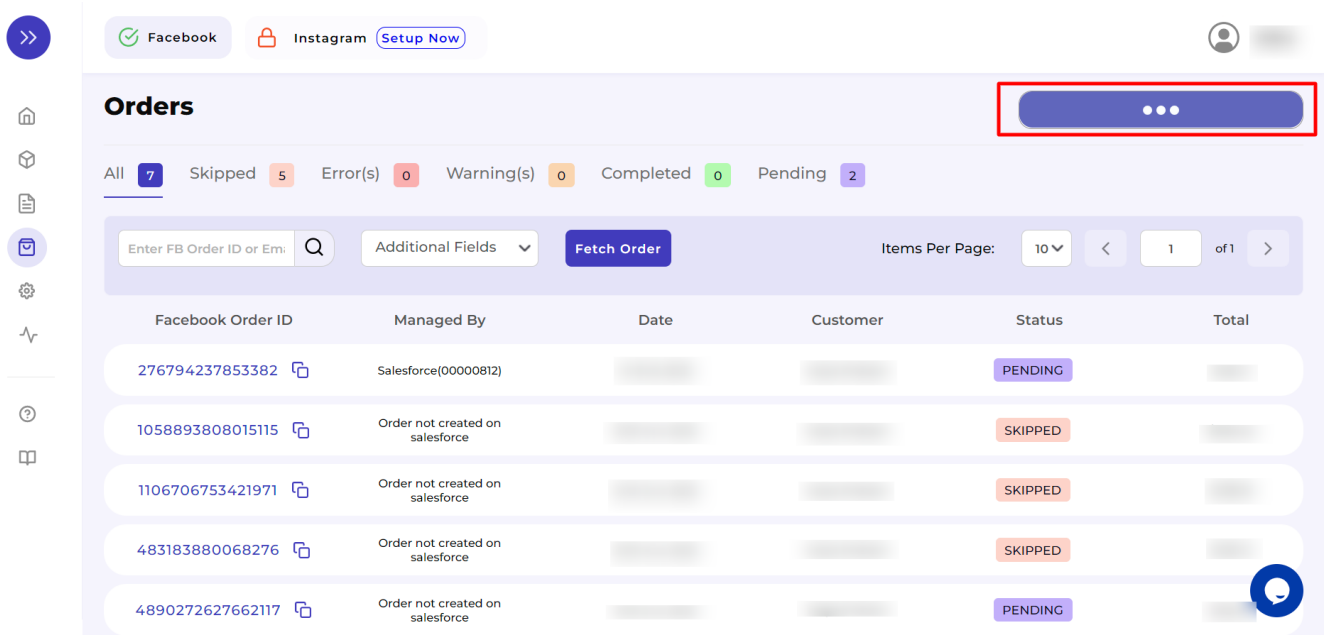
- Click on the “**Orders”** Tab as displayed below:



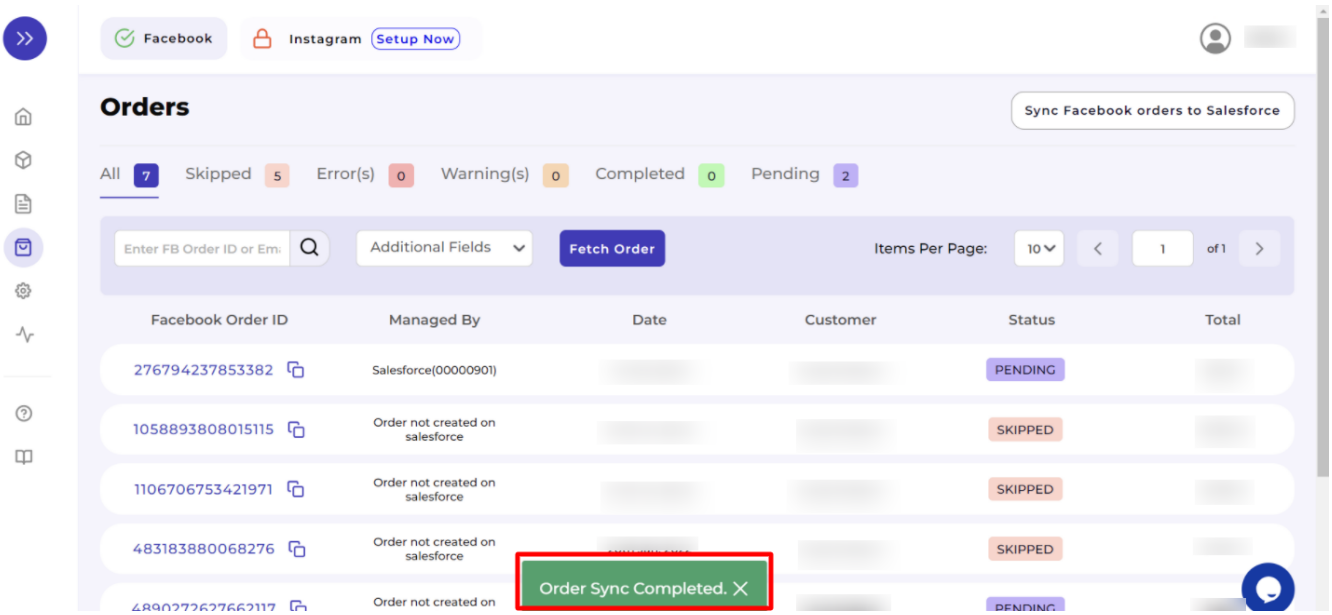
- Just under your profile on the right-hand side, you will see a button **“Sync Meta orders to Salesforce”.** For your convenience, we have highlighted it in the screenshot attached below:



- Click on the button **“Sync Meta orders to Salesforce”** and wait till it completes the syncing process.

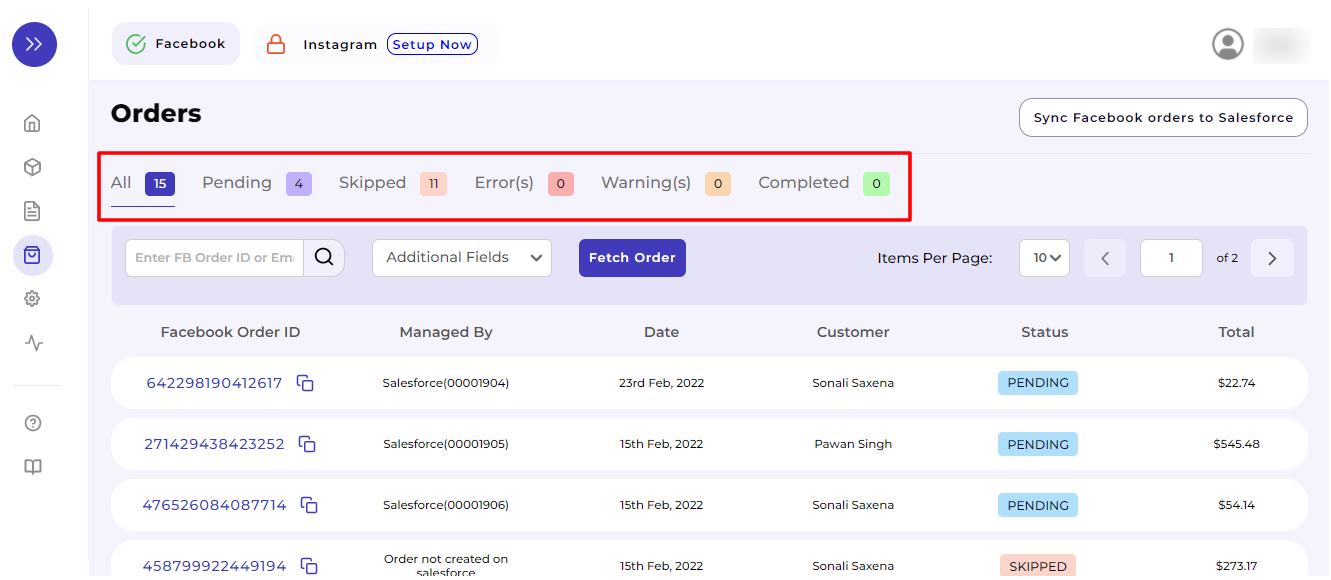


- Once the orders are synced, you will get a confirmation message as **“Order Sync Completed”**.



7.2. What are the different order statuses?

The different order statuses reflect the current condition of the order and what needs to be executed next.

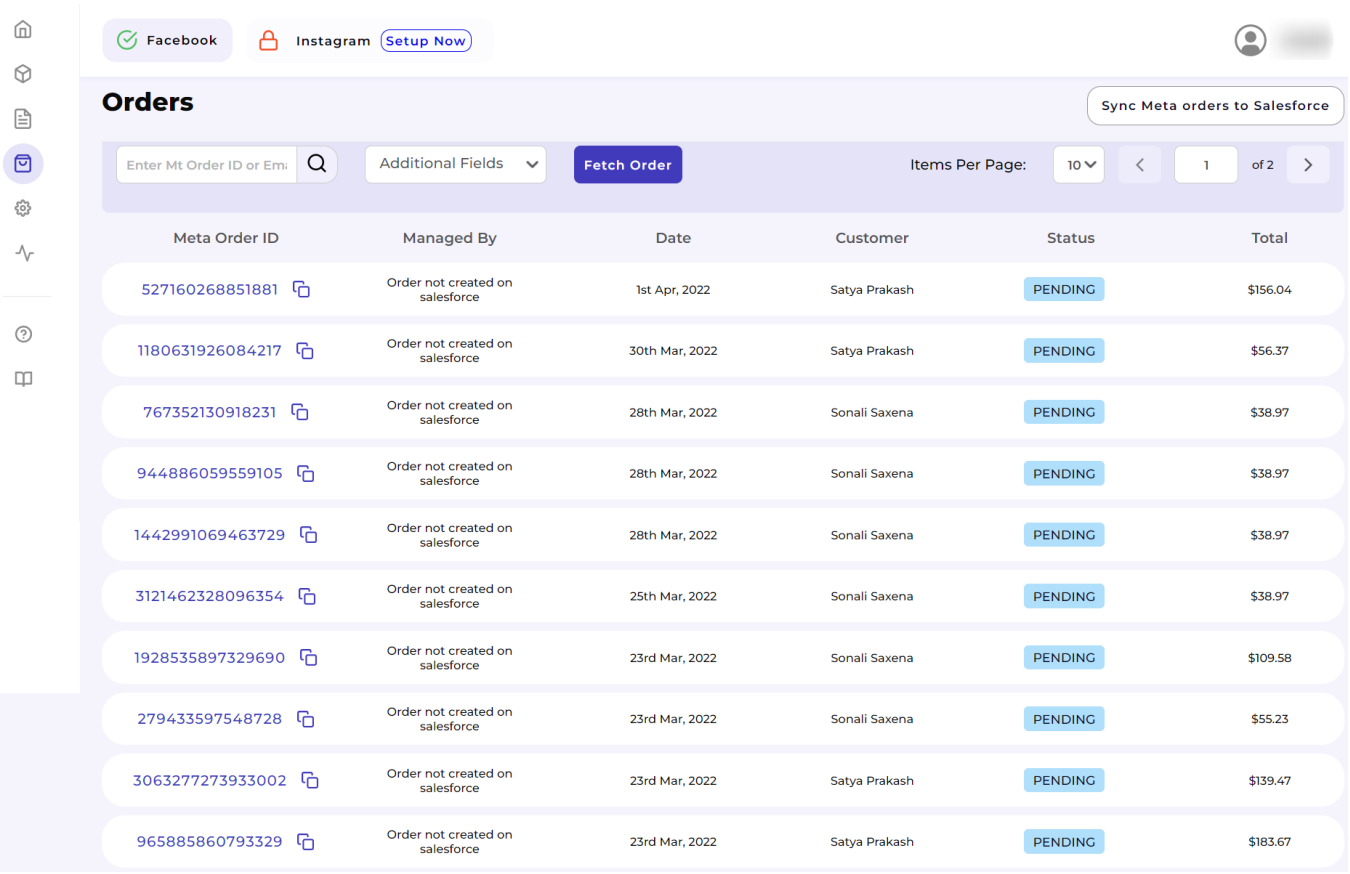


Below we have listed all the statuses alongside their definition:

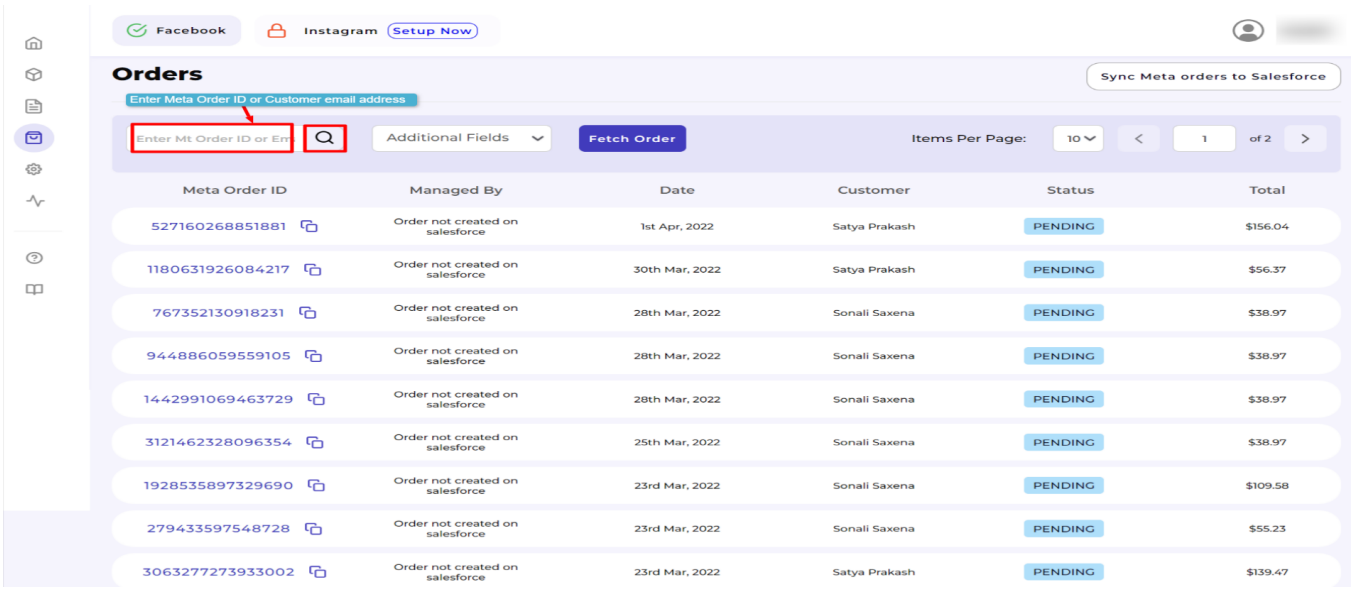
- **All:** Total no. of orders received.
- **Pending:** Total no. of orders pending to be fulfilled.
- **Skipped:** Total no. of orders skipped due to Product ID mismatch that needs to be mapped.
- **Error(s):** Total no. of orders with error(s) that need to be corrected.
- **Warning(s):** Total no. of orders with the warning that needs to be corrected.
- **Completed:** Total no. of orders fulfilled.

7.3. How to search for orders?

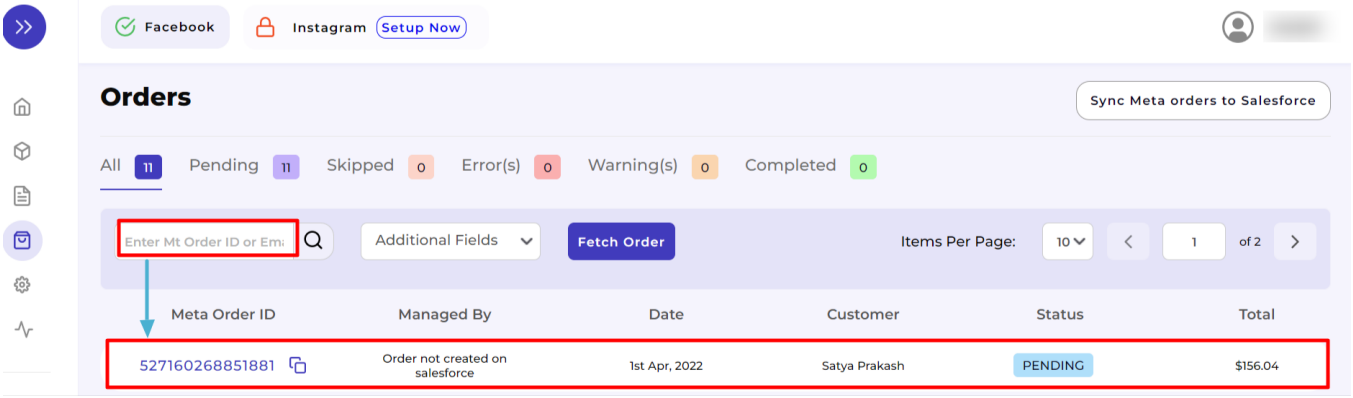
For this you need to enter the **Meta Order ID** or **Customer Email address** in the search box as displayed below:



For your better understanding, we have illustrated the same through *an example:*

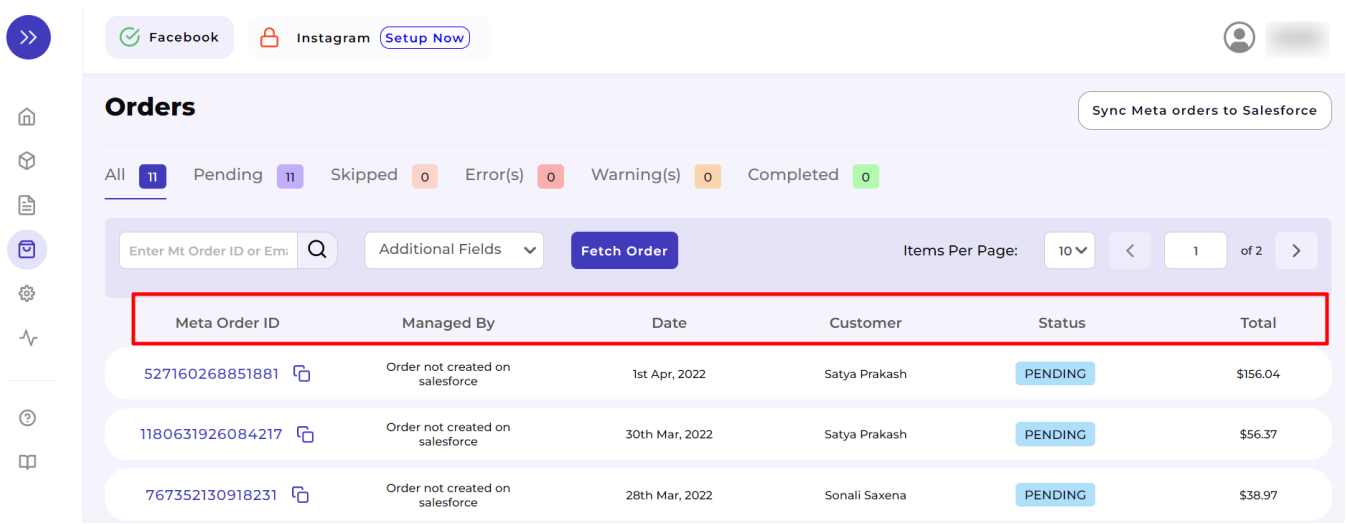


Once the app will complete its search operation, would reflect the result as displayed in the below screenshot.



7.4. What are the order fields?

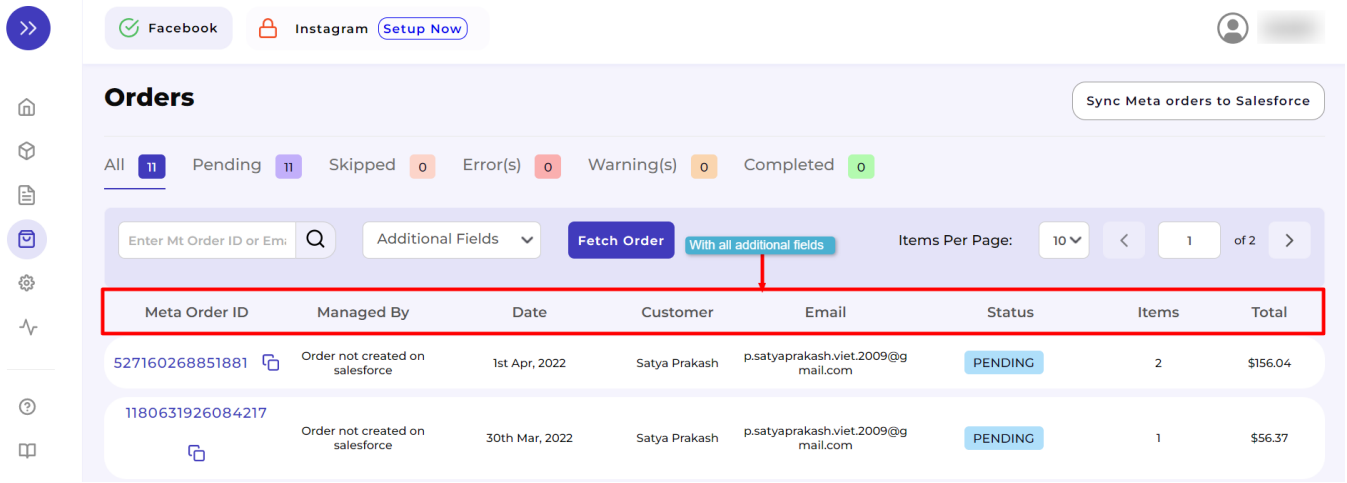
The order fields are the *report heads* that give you a summary of the orders received from Meta Commerce Surfaces so far.



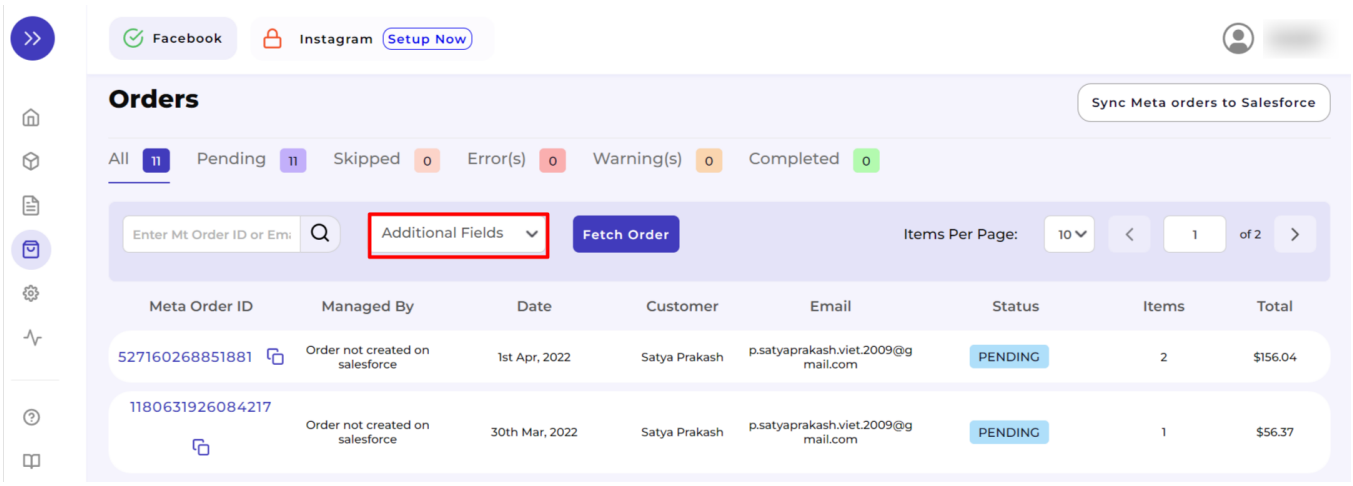
- **Meta Order ID:** It is the unique order ID for the orders placed through Meta Commerce Platforms.
- **Managed By:** It indicates where the particular order is managed. If the order is created on Salesforce Store, it displays as *"Salesforce(ID)"*, else it reflects as "*Order not created on Salesforce"*, and thereafter you have to accordingly perform the operation as per the *Order status*.
- **Date:** It shows the date of order created.
- **Customer:** It shows the customer's name who has placed the order.
- **Status:** It shows the real-time status of the order received.
- **Total:** It shows the total amount of the order placed.

7.5. What are the additional fields?

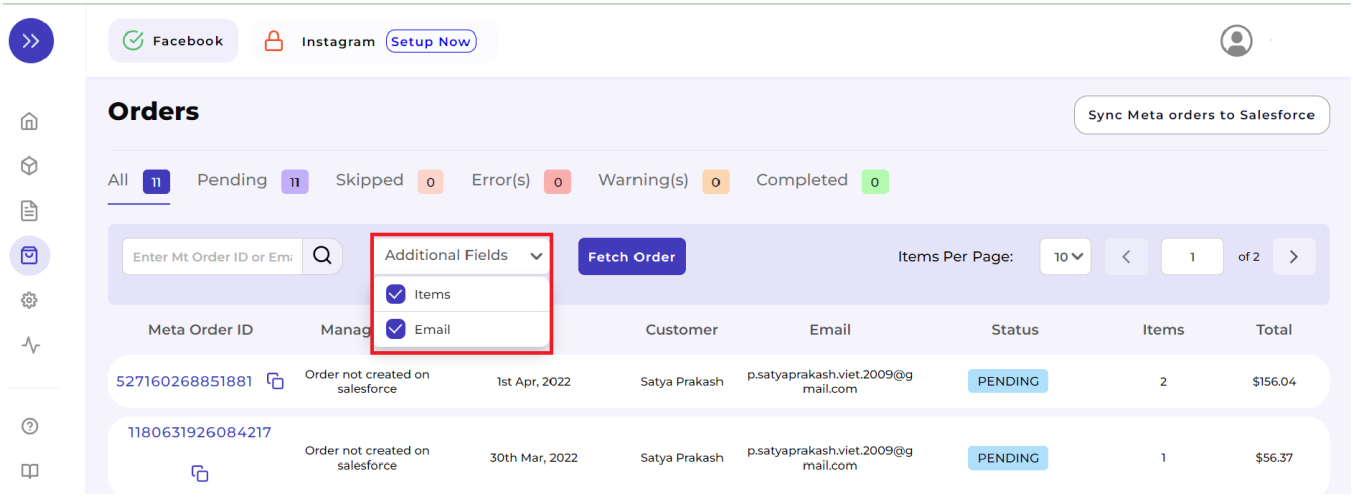
For a more refined order search, we have provided **Email and Items** as the **Additional Fields** in the app.



These **Additional Fields** are available adjacent to the search box as shown below:

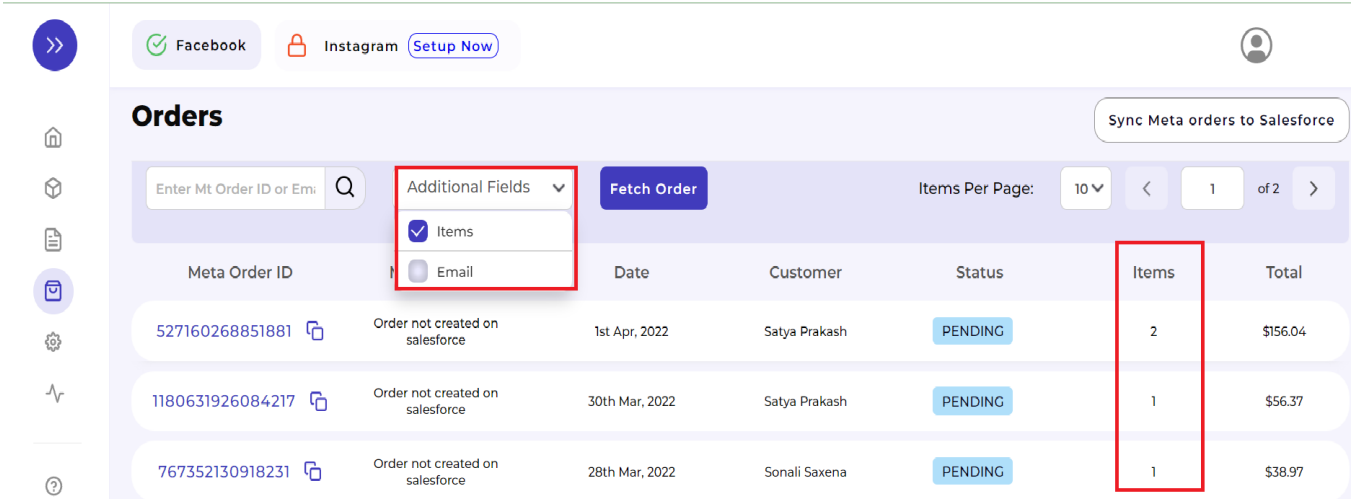


Click on the *dropdown to add these fields* to the report displayed. You can add both of them or any one of these fields as per your preference.

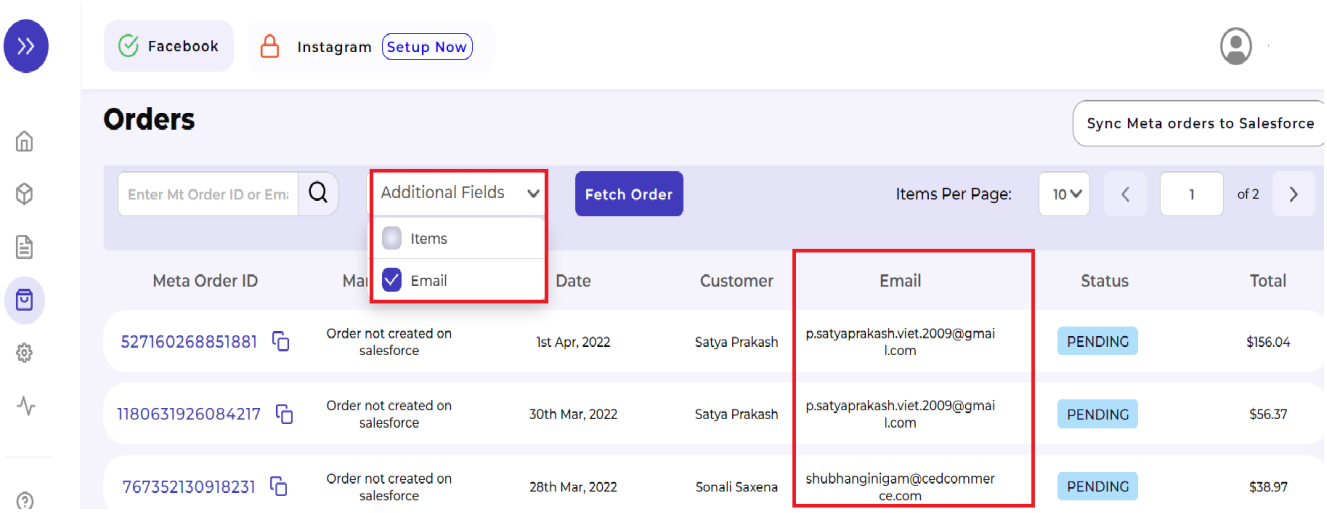


We have illustrated the same through *a sample* as displayed in the consecutive screenshots.

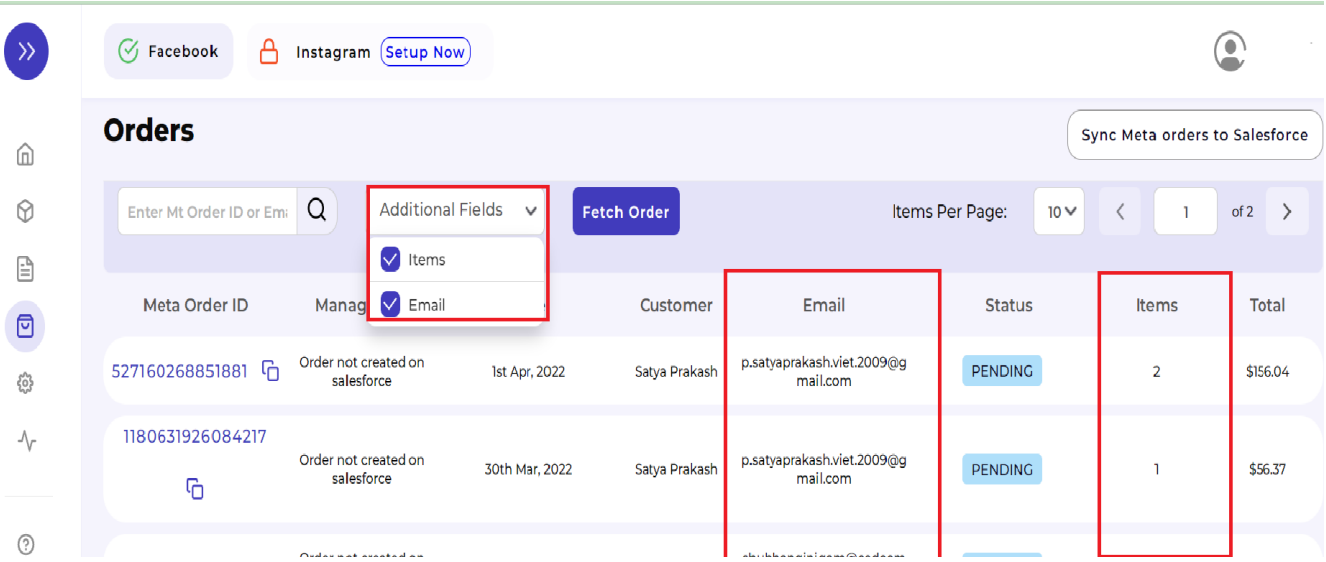
- If you simply add **“Items”** to the report.



- If you only add **“Email”** to the report.



- All the Additional Fields for a day-end quick summary.



7.6. How to fetch orders?

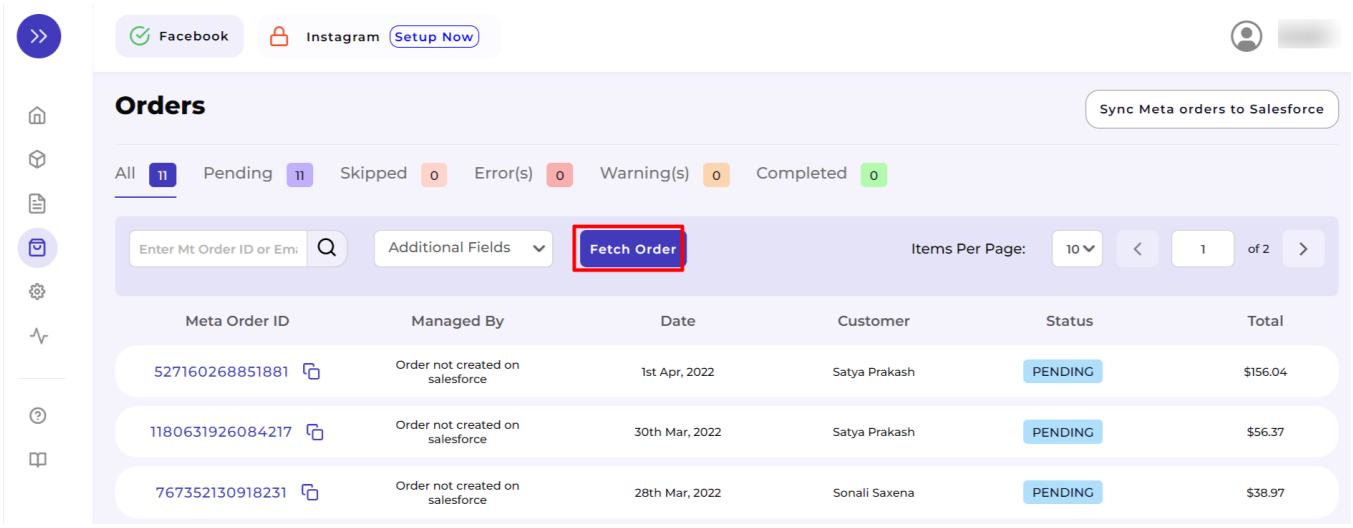
You have to fetch an order when that particular order does not get synced in the app from Meta Commerce Platforms.

It usually occurs due to server/network issues that sometimes delay syncing between the app and Meta Commerce Platforms.

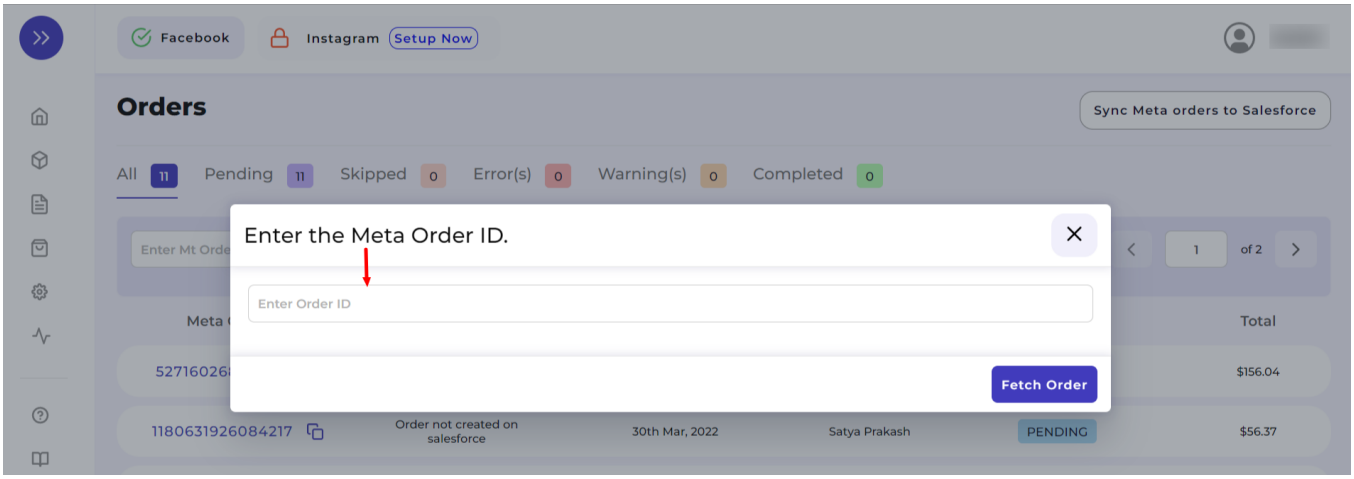
To cope with the same, we have provided this feature where you just need to copy your Meta Order ID to fetch the order and create that order on your Salesforce Store.

Below we have explained the same step by step.

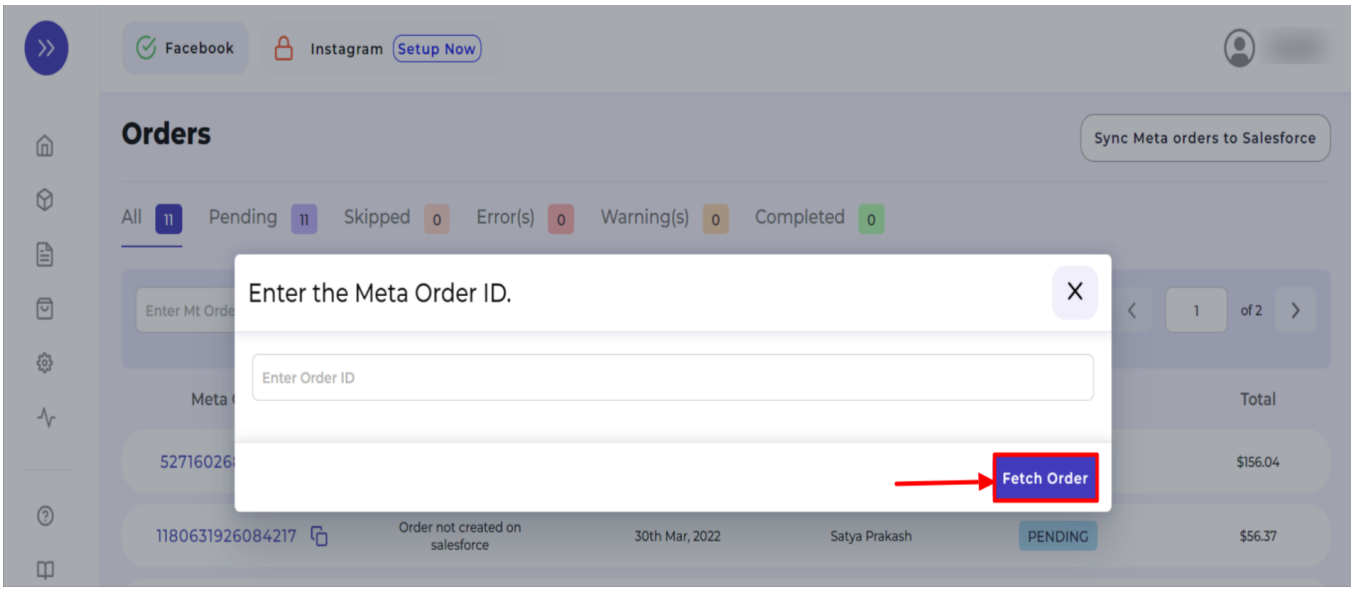
- Click on the “**Fetch Order”** button as shown below:



- Enter the **Meta Order ID** over here.

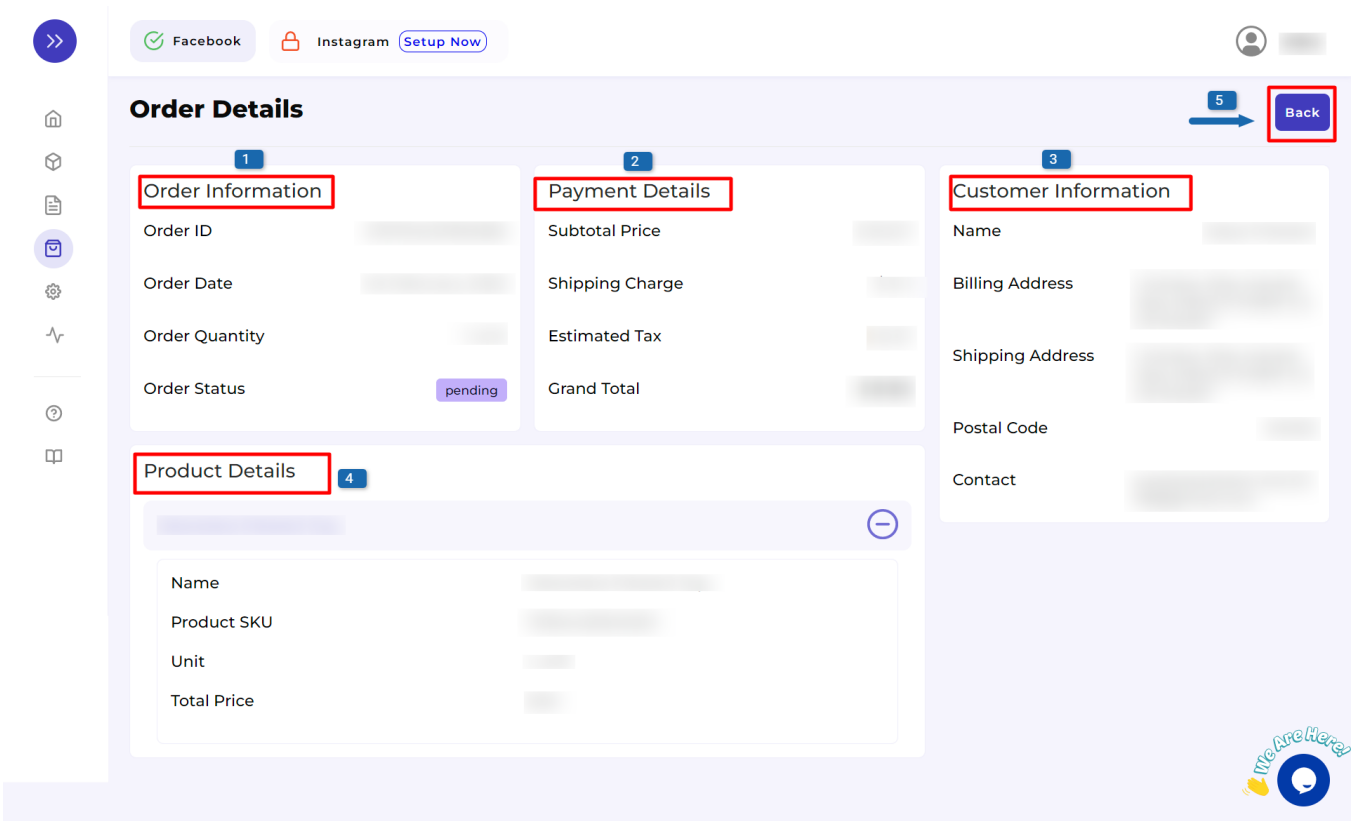


- Submit the Order ID by clicking on the button **“Fetch Order”**.



7.7. What is displayed under Order Details?

The *Order Details* tab furnishes the following:



- ***Order Information –*** The unique Order ID, the date of the order created, the total quantity, and the current status of the order.
- ***Payment Details –*** The price of the order placed, the shipping charges applicable, the estimated tax as per the product ordered, and hence, the total price value paid by the customer.
- ***Customer Information –*** Customer Name, the billing address, the shipping address along with the postal code, and email address as contact information.
- ***Product Details –*** The name of the product ordered, inventory detail as SKU, total units ordered, and the total price.

7.8. How to map skipped orders?

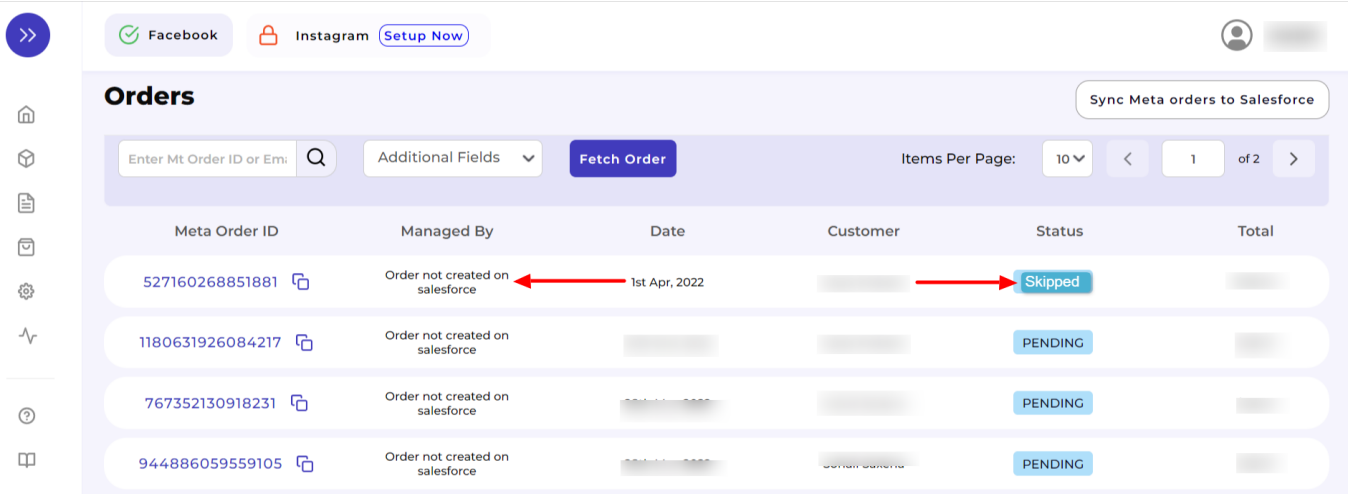
The *skipped orders* are those that need to be managed and fulfilled from the merchant end. Such type of condition arises when the order placed for the product(s) is:

- unavailable on the Salesforce Store,
- deleted from Salesforce Store but is available on the Meta Catalogue, or
- directly created on the Meta Catalogue & is not synced to Salesforce Store.

For these skipped orders, you need to *map it with the similar kind of new product available in your Salesforce Store*.

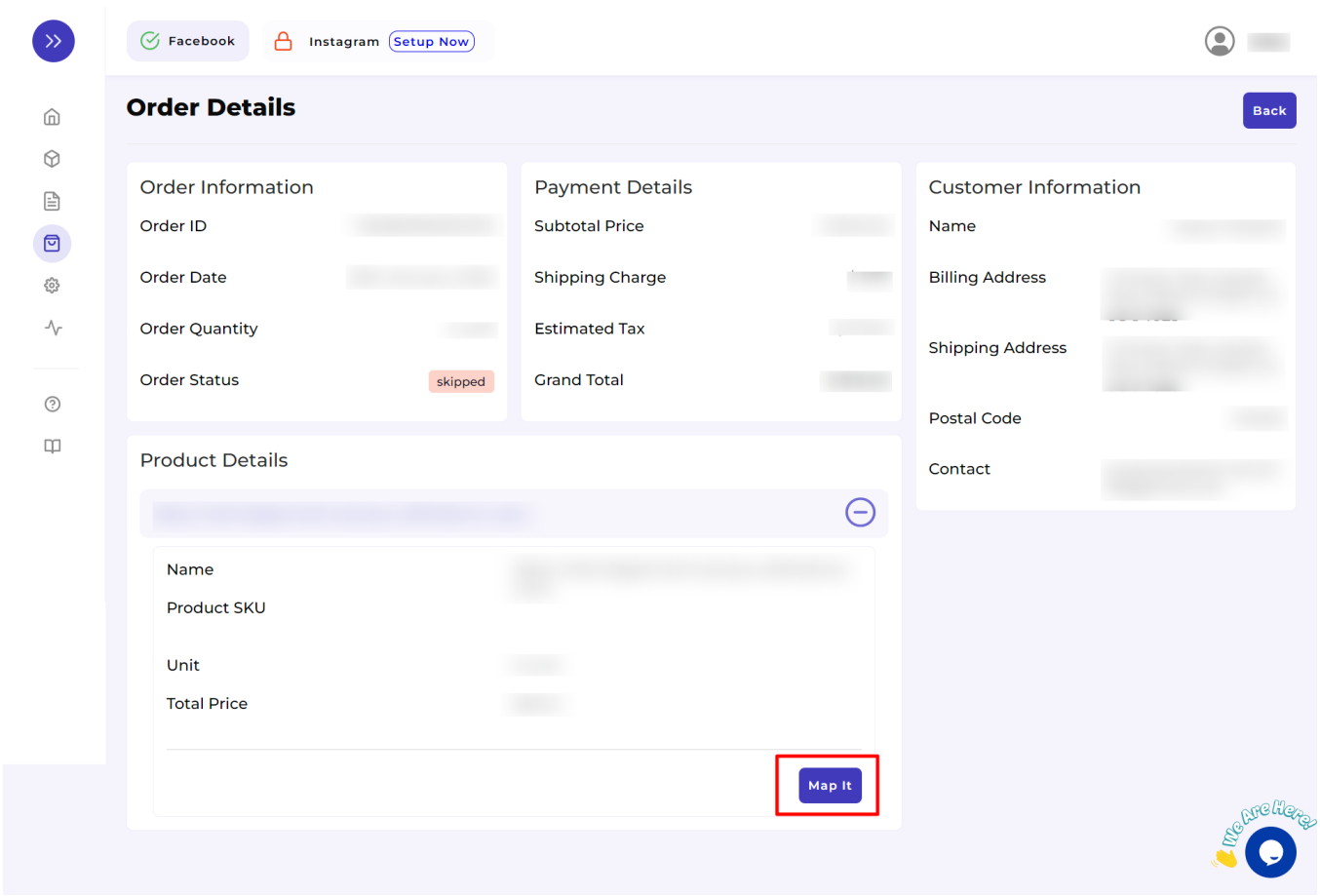
Let's show you how to practically do it.

- Please refer to the screenshot below displaying an **order which is not created on Salesforce Store** and thus, flagged as **Skipped**.

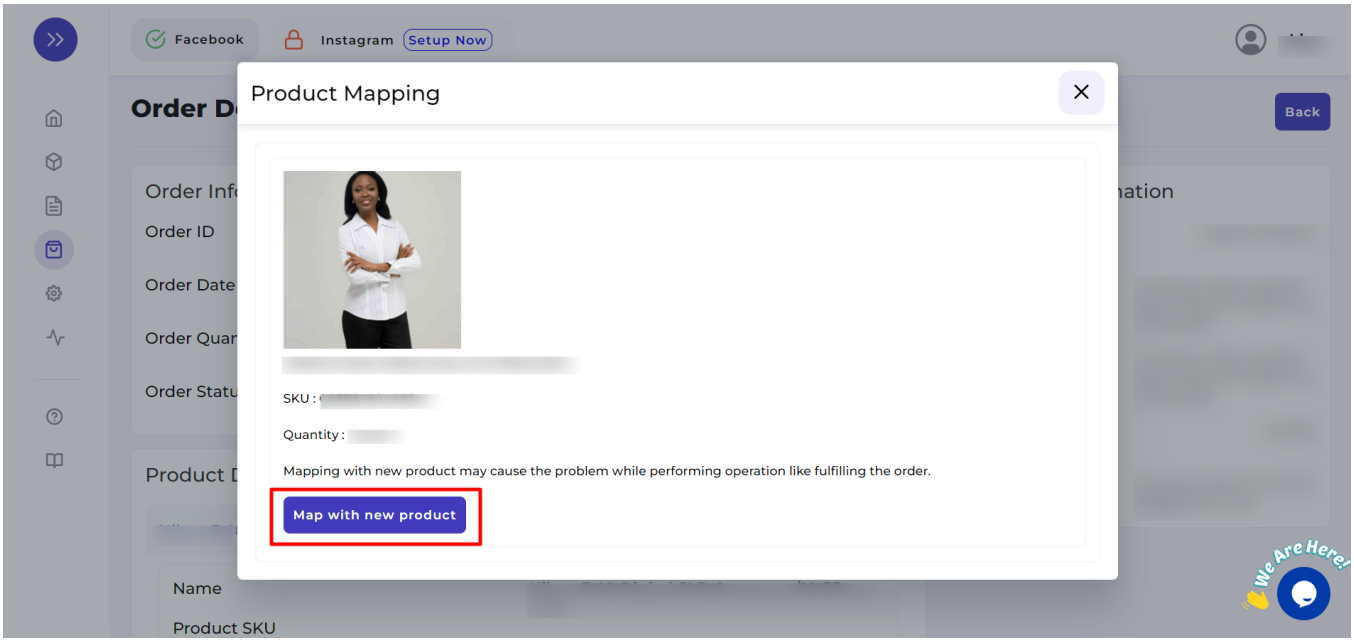


- Now, you need to **click on that particular Order ID** and after that, you will be **redirected to its Order Details Page.**

- Scroll down below to **Product Details** and Click on the button "**Map it"**.

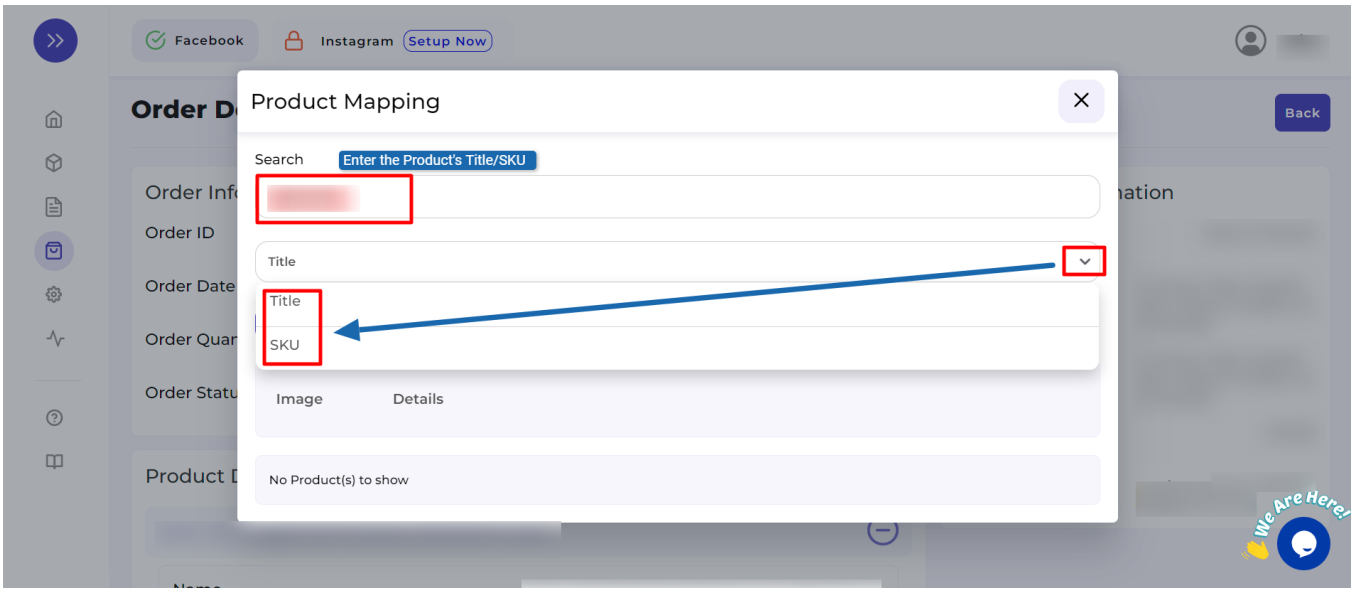


- A window of **Product Mapping** will appear in front of you. Here, you need to click on the button **“Map with new product”**.

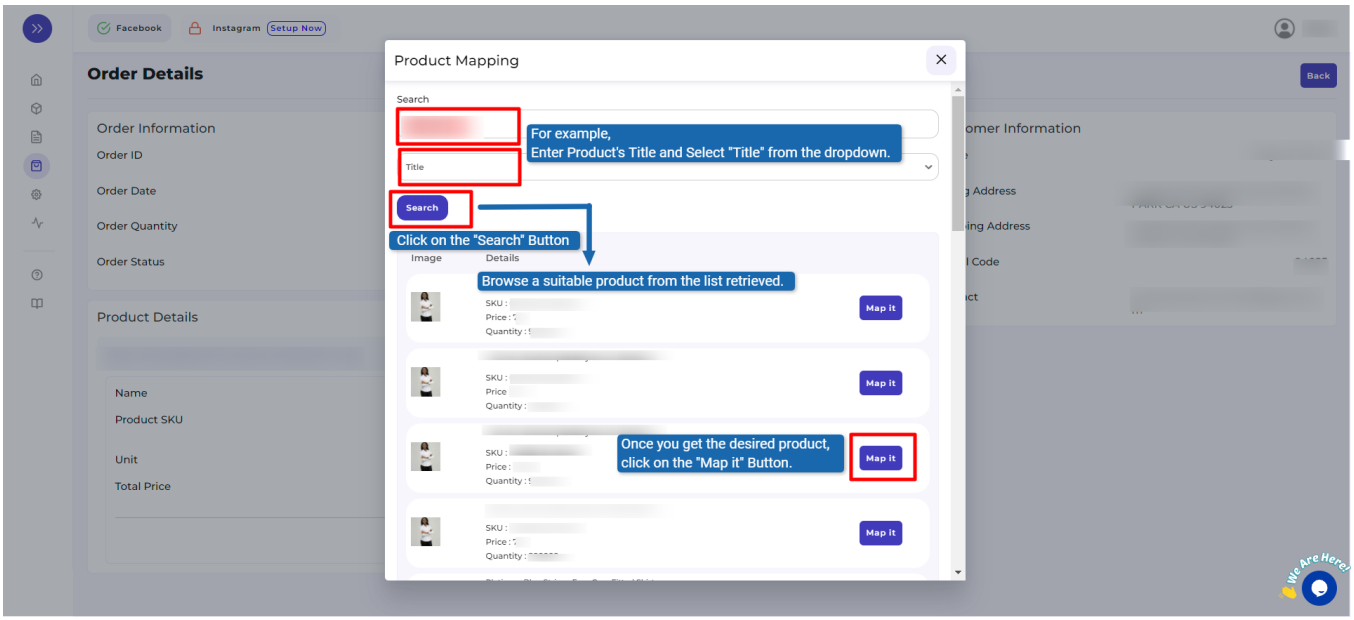


- Next, you have to **search** *for a similar kind of product through its* ***Title or SKU***. If you are searching for a product with the help of its Title, select “Title” from the dropdown menu. Similarly, if you are searching

through SKU, select “SKU” in the dropdown.

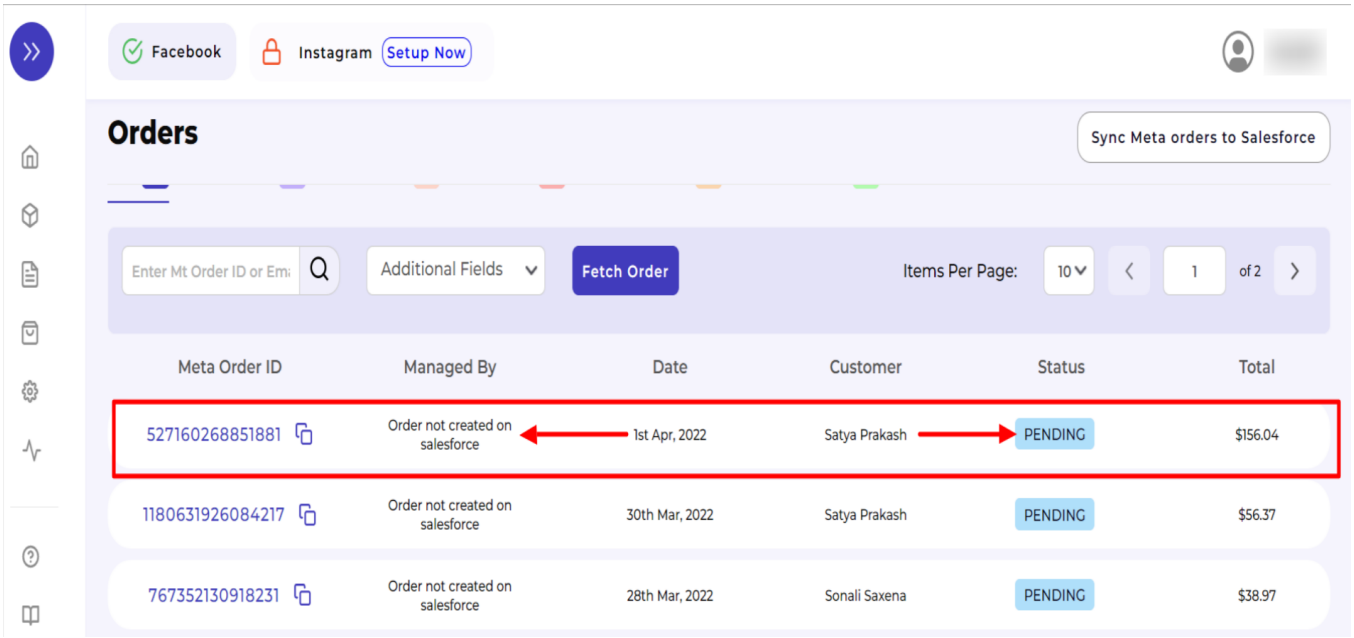


- For your convenience, we have explained it through a sample as shown below:



7.9. How to manage pending orders?

The *pending orders* are those that need to be fulfilled from your end i.e. from the merchant side. Also, the product ordered is available both on Salesforce Store as well as the app.



For such types of orders, the app automatically acknowledges the order from Meta Commerce Platforms and creates it on Salesforce Store.

8. Configurations Tab

Configuration Tab furnishes the below mentioned merchant details:

- Username and Email ID that you used to register with CedCommerce API
- Facebook and Instagram Shop Set-Up
- Category and Attribute Mapped
- Facebook Settings
- Salesforce Settings
- Reset Meta Business Manager Account Connected and Facebook Page

For a seamless and clear user experience, the tab is divided into four divisions:

- **General Setting**
- Facebook Settings
- Salesforce Settings
- Account Connection

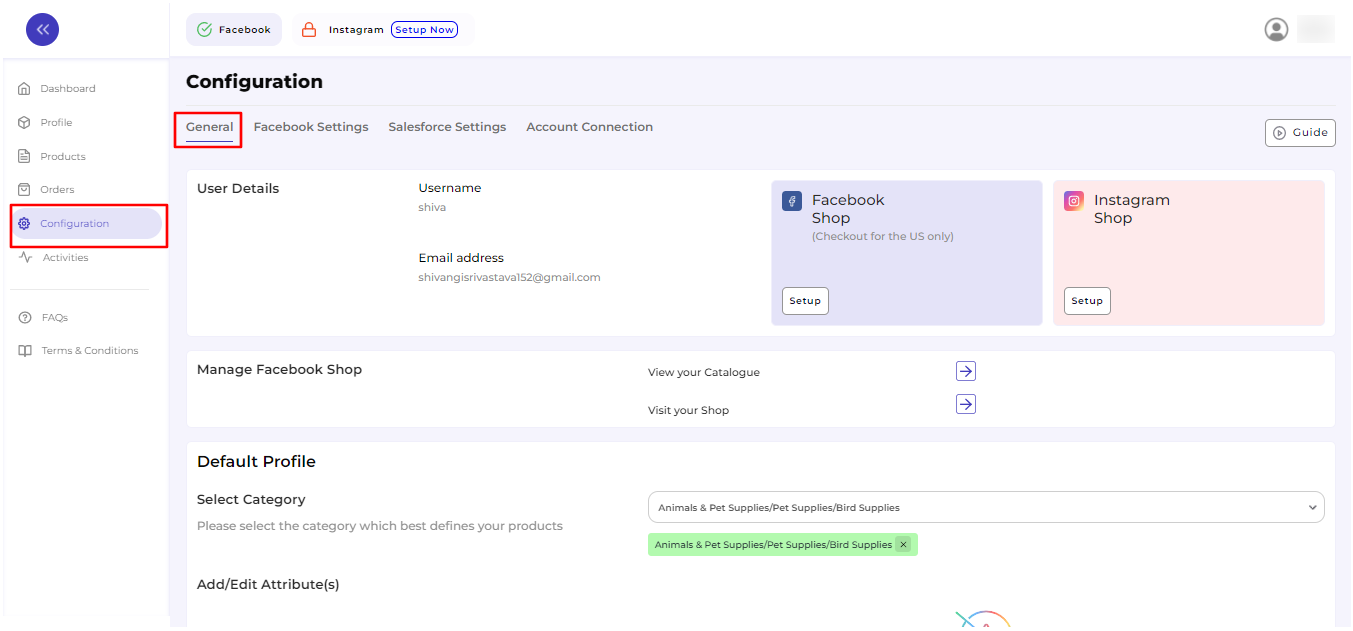
8.1. General Settings

Here you can manage –

- Your user details – username and email ID
- Connected Facebook and Instagram Shops
- Can View your Shops and Product Catalogue

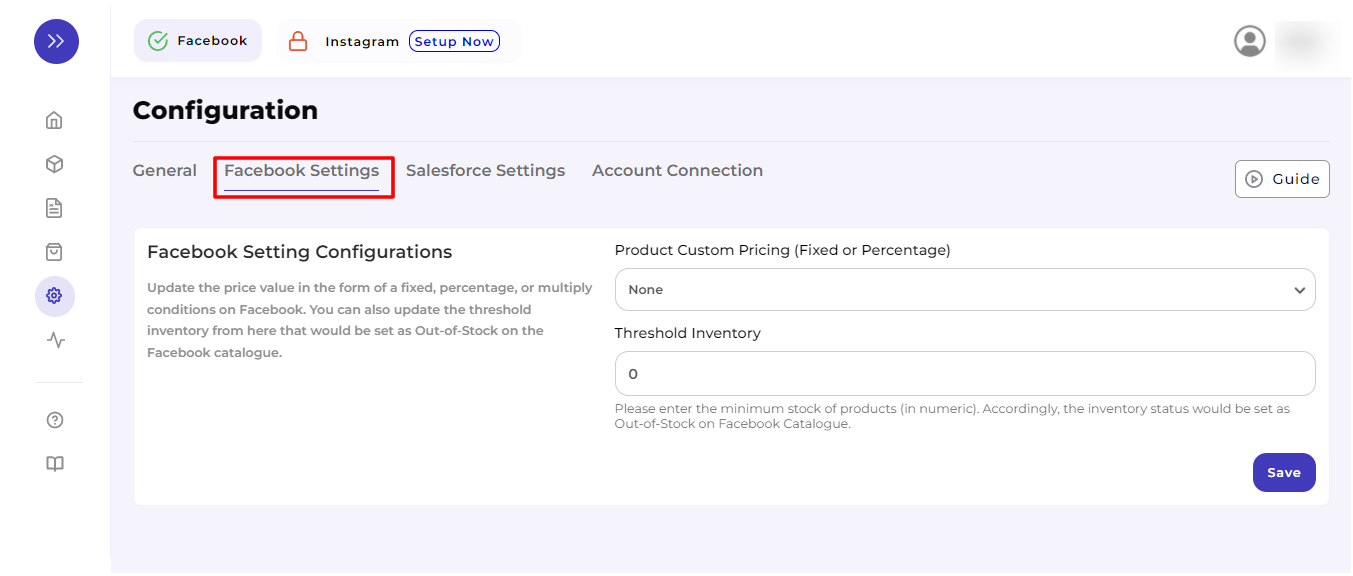
- Current category and corresponding attributes mapped.
- Changes – any updations

Make sure to click on the **“Save”** button in case of any changes made.



8.2. Facebook Settings

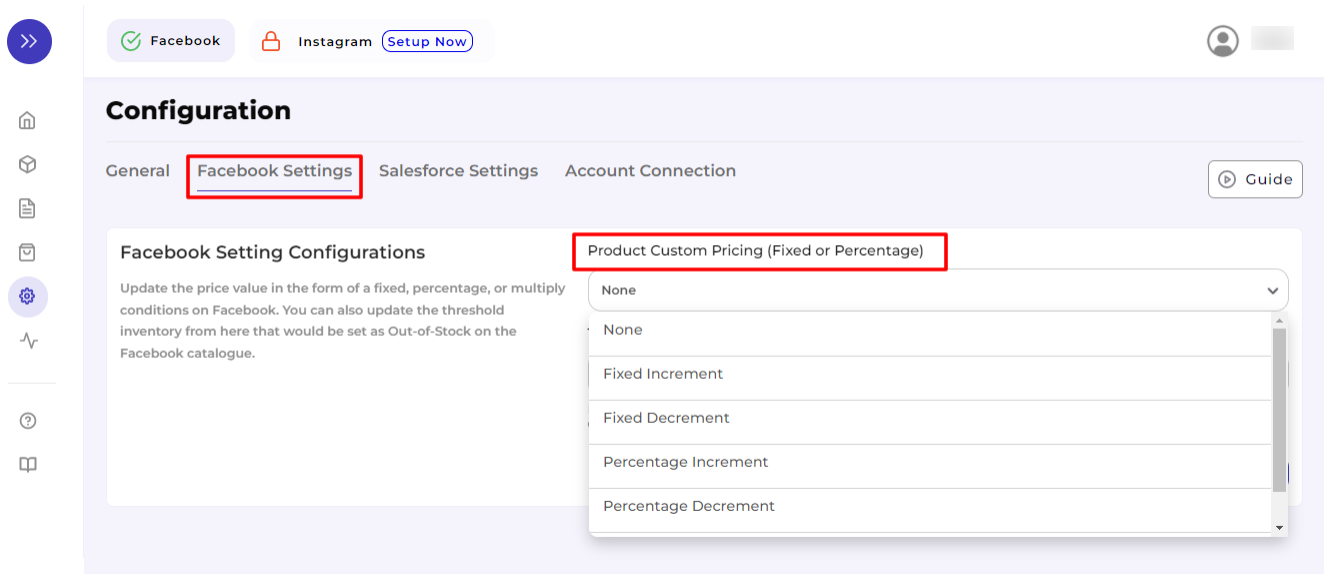
In Meta Setting Configurations, you can manage **Price Update** and **Threshold Inventory** as explained in the below steps:



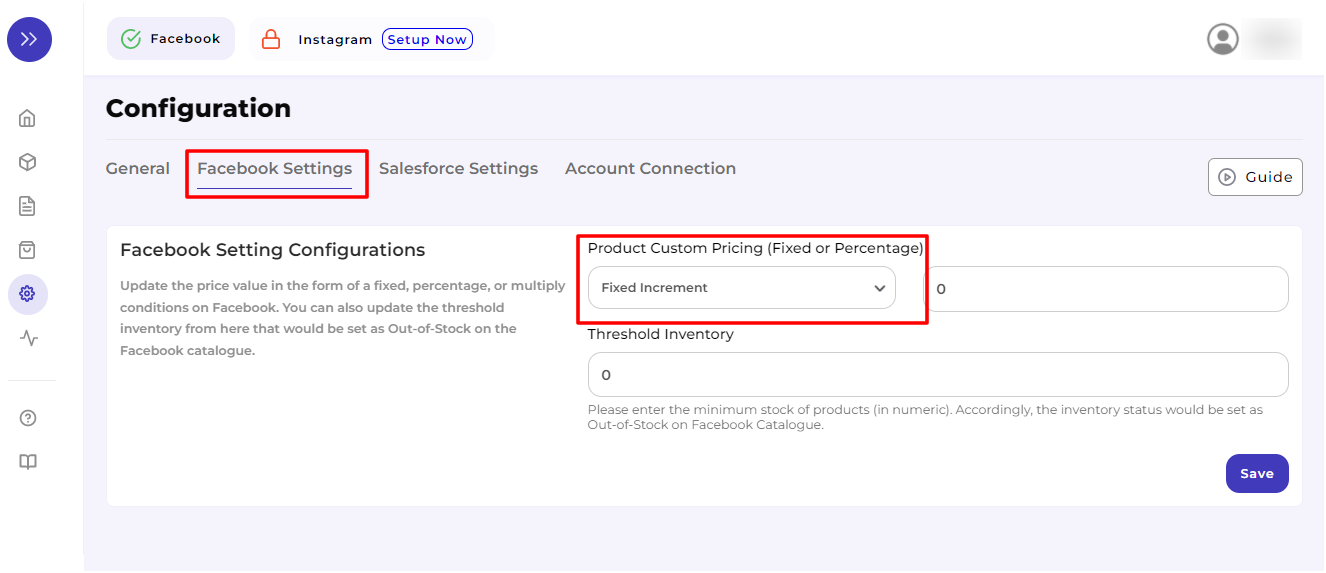
Step 1

Select **“Price Update”** from the dropdown options – Fixed Increment, Fixed Decrement, Percent Increment,

Percentage Decrement, and Multiply.

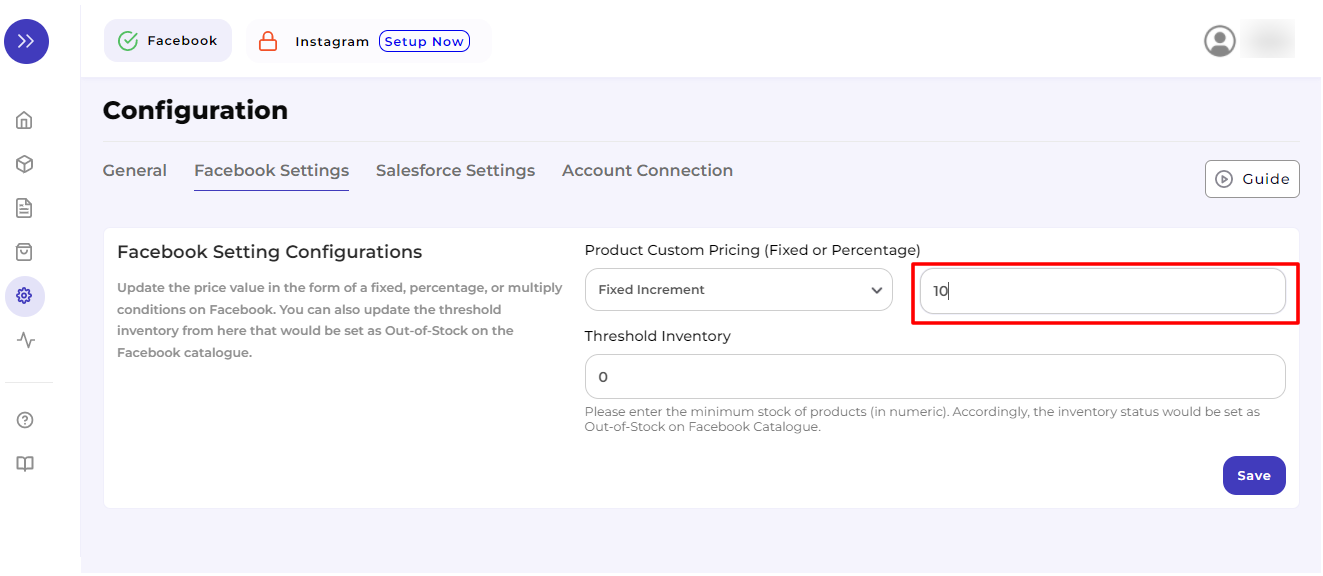


For a better understanding of it, we have attached a sample below:



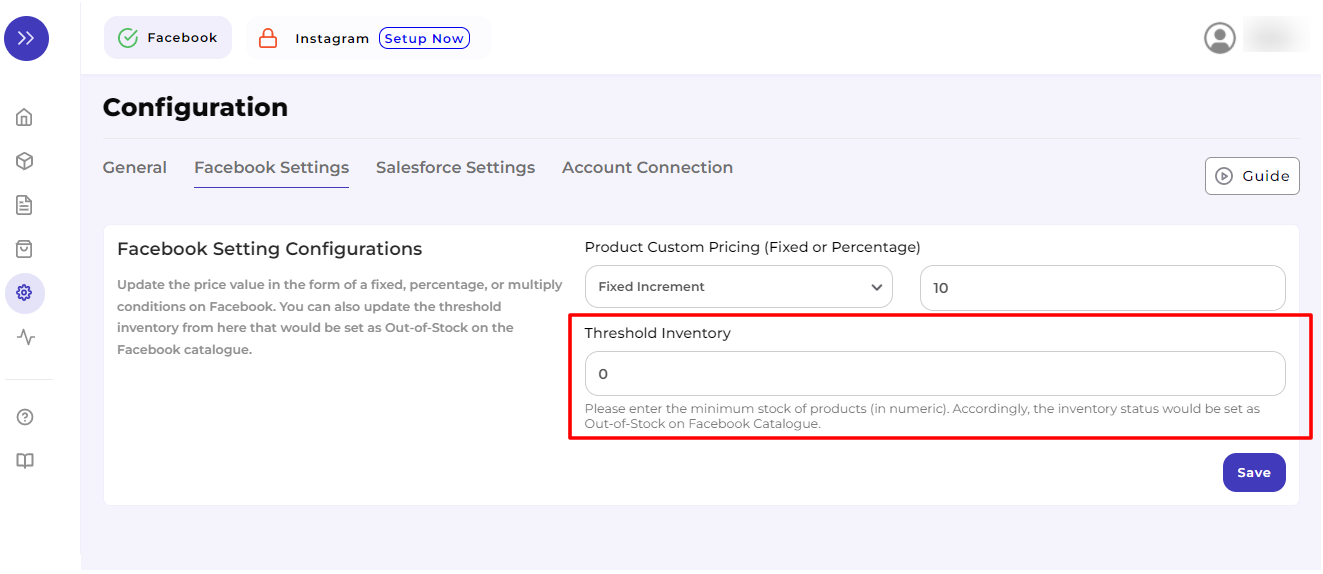
Step 2

Enter the **value** of the price to be updated.



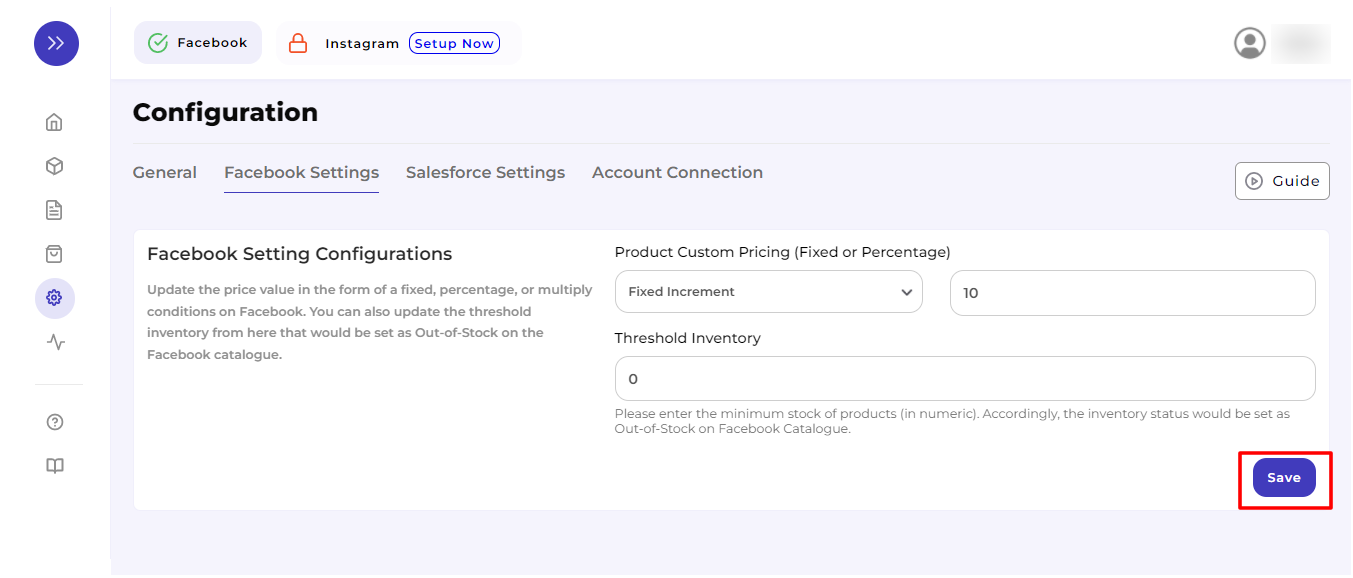
Step 3

Enter the **minimum Threshold Inventory.** By assigning the threshold value, you trigger product inventory on Facebook & Instagram Shops as **out-of-stock.**



Step 4

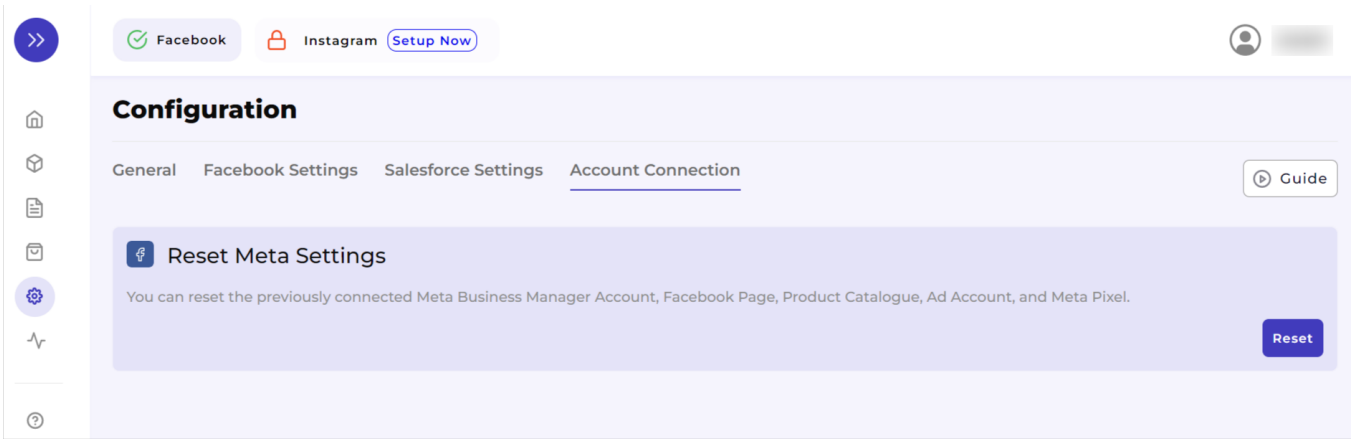
Check the details entered and click on **“Save.”**



After saving the Meta Settings, you need to re-upload the products so that the changes made here reflect on your connected Meta Catalogue.

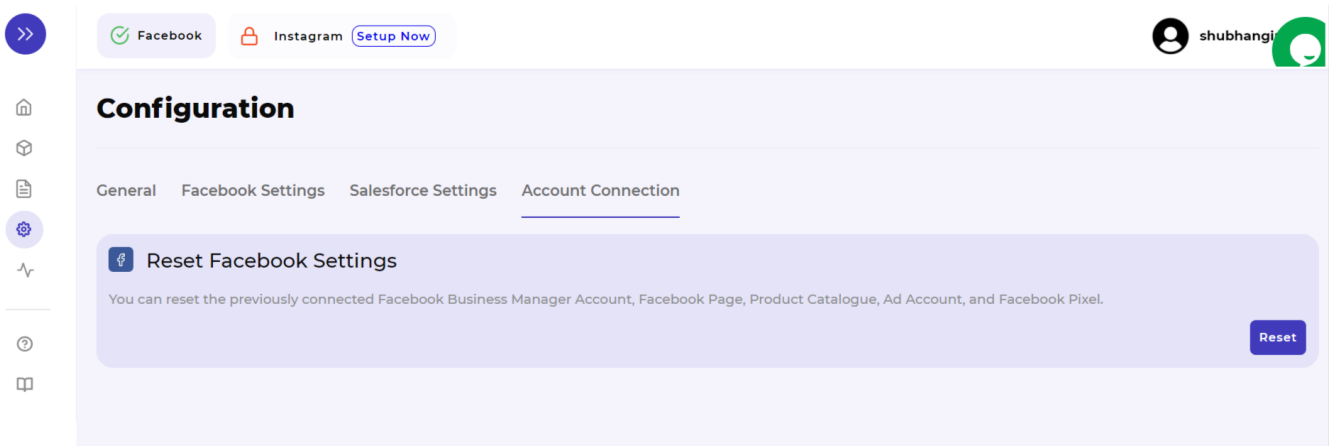
8.3. Salesforce Settings

Under this setting, you will get your Salesforce Commerce Account information that you registered during Onboarding Step 1 – Details Authorization.

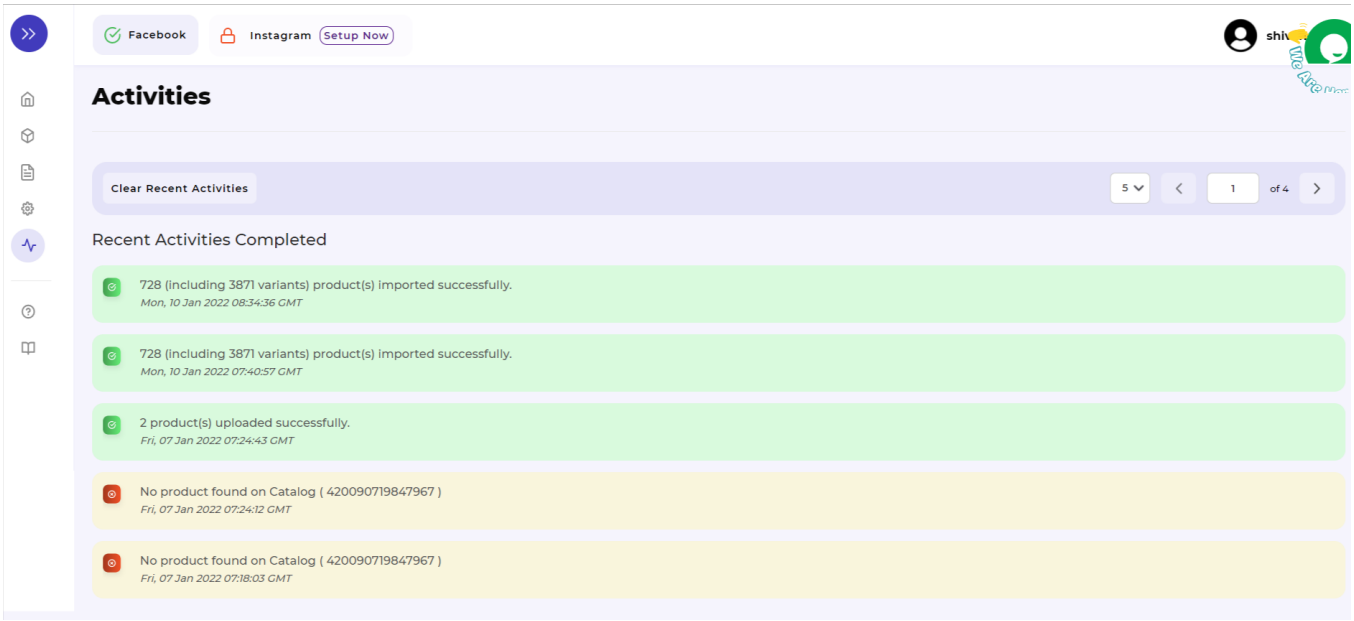


8.4. Account Connection

In account connection, you can **reset the Meta Settings** -Meta Business Manager Account, Facebook Page, Product Catalogue, Ad Account, and Meta Pixel connected during Onboarding Step 2 – Connect Facebook Account.



9. Activities Tab

The Activities tab updates about **the real-time progress of your ongoing and recent operations performed,** like product synchronization, importing or uploading of products, profile creation, changes made in product attributes, details, and status, etc.

We have attached a sample below to provide you with a clear understanding of it.