

CLOUDERIA

POWERING B2B TRANSACTIONS

Unzer Payments for SFDC B2B Commerce Cloud

SEAMLESS PAYMENT PROCESSING

Accelerate sales, streamline operations, and deliver a secure, frictionless payment experience with integrated Unzer payments in Salesforce B2B Commerce Cloud. Support multiple payment methods, ensure real-time status updates, and meet the demands of modern B2B buyers with a scalable and compliant solution.



SALESFORCE B2B COMMERCE CLOUD

Salesforce B2B Commerce Cloud is a digital commerce platform that enables businesses to sell products and services online to other businesses, offering personalized experiences, self-service purchasing, and seamless integration with Salesforce CRM.

UNZER PAYMENT GATEWAY

Unzer is a comprehensive payment platform designed to facilitate seamless and secure online transactions for businesses and nonprofits. It supports a wide range of payment methods.

www.clouderia.digital

Accelerating B2B Sales with Secure Unzer Payment Integration for Salesforce

Efficient and reliable payment processing is essential for B2B commerce success. To meet this demand, Clouderia implemented a robust solution integrating Salesforce B2B Commerce Cloud with the Unzer payment gateway—streamlining transactions, improving operational transparency, and delivering a seamless buyer experience.

Benefits

Streamlined Payment Management

- Automated workflows minimize manual processing, allowing sales teams to focus on customer relationships and strategic growth instead of administrative tasks.

Enhanced Buyer Experience

- Personalized payment interactions and seamless order-to-cash processes help strengthen buyer loyalty and satisfaction.

Secure and Reliable Transactions

- Integration with Unzer ensures PCI-compliant, 3D-secure, fraud-protected transactions, building trust with business customers.

Improved Operational Efficiency

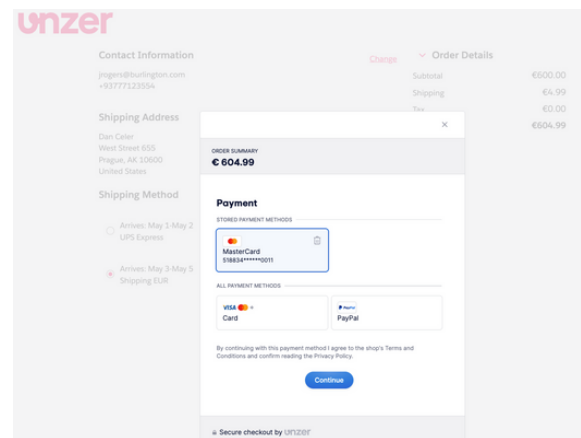
- Automation of payment capture, refunds, and reconciliations reduces overhead and improves order processing speed.

Transparency and Real-Time Updates

- Instant payment status updates and notifications keep both customers and internal teams informed throughout the transaction lifecycle.

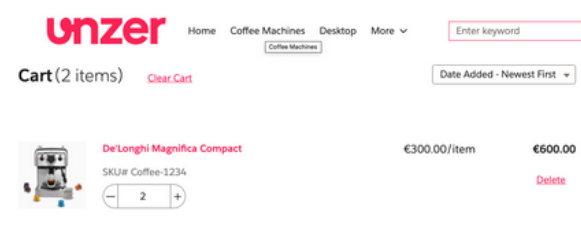
Global Payment Capability

- Multi-currency support, localized payment forms, and language options enable easy expansion into international B2B markets.



Unified Checkout Experience

The checkout experience is seamlessly integrated with Salesforce B2B Commerce Cloud, ensuring a unified and efficient order and payment management process. The Unzer payment gateway enables real-time synchronization of transaction data, customer information, and order details with Salesforce, creating a single source of truth for sales, finance, and customer service teams.



Key Features

The solution delivers a seamless purchasing experience for customers while equipping business teams with powerful tools for efficient payment and order management.

Seamless Checkout Integration

- Intuitive and user-friendly checkout experience embedded within the B2B storefront, supporting dynamic product promotions and customizable URL parameters for campaign or partner attribution.

Customer Matching & Transaction Creation

- Automatic matching of customer accounts based on email or company ID, with real-time creation of Opportunities or custom transaction records for both one-time and recurring payments.

Secure Unzer Payment Gateway Integration

- Robust multi-currency support for international transactions. Secure handling of payments, refunds, and chargebacks with full traceability and audit-ready documentation.

Recurring Payment Automation

- Flexible recurring billing options for subscription-based services or repeat B2B purchases, including retry logic for failed transactions to maintain revenue continuity.

Refund and Dispute Management

- Streamlined workflows for processing refunds directly from Salesforce, with integrated chargeback alerts and response handling to reduce financial exposure.

Transaction Status Monitoring and Reporting

- Real-time synchronization of payment statuses, from "Pending" to "Completed," providing transparency for internal teams and customers alike.

Advanced Attribution and Analytics

- Support for dynamic campaign or partner tagging through URL parameters, enabling detailed sales attribution, marketing ROI analysis, and operational insights.

Technical Overview

Clouderia's solution integrates Unser PayPage directly into Salesforce B2B Commerce storefronts, delivering a fully embedded and secure payment experience. It supports different types of payments through dynamic endpoint selection and asynchronous processing. Below is an overview of the technical components and workflows that power this integration.

To enable the integration, the Clouderia Salesforce package must be installed in your Salesforce environment. This package includes all necessary components—custom objects, Apex classes, Lightning components, and configuration settings—required for seamless Unser payment processing within B2B Commerce Cloud. The installation can be completed via a secure package link and typically takes just a few minutes. Once installed, an admin can follow the post-installation steps to assign required permissions, configure endpoints, and map payment workflows to existing business processes.

1. Salesforce Package Installation

I: Ask Clouderia for the Package Installation Links

- Obtain the secure production installation URL for the Clouderia package (provided by Clouderia or the implementation team).
- Open the link in a browser while logged into your production Salesforce environment.

II: Choose Security Settings

- On the installation screen, choose the "Install for Admins Only" option (recommended for initial testing).
- Click Install and approve any third-party access prompts if requested (typically for Unser API endpoints).
- Wait for the installation to complete. You'll receive a confirmation email once successful.

III: Assign Permission Sets

- Navigate to Setup > Users > Permission Sets.
- Assign the relevant Clouderia-provided permission sets to System administrators and Commerce Cloud users managing orders and payments

2. Setup Commerce App & Store Configuration

- Navigate to Setup > Commerce Settings
- Enable Refreshed Commerce App.
- Navigate to Store Settings
- Update your Store Currencies
- Navigate to Checkout and Shipping and add Shipping Method(s)

3. Configure Custom Settings

- Navigate to Setup > Custom Settings .
- Locate the Unzer Settings and enter
 - Private Key
 - Public Key
 - API URL

4. Configure Site Lightweight Runtime (LWR)

- Navigate to Setup and search for your Site
- Open your B2B Store Builder
- Add to Head Markup

`<script type="module" src="https://static-v2.unzer.com/v2/ui-components/index.js"></script>`

- Add Trusted Site (e.g. <https://static-v2.unzer.com>)

5. Store Checkout Page Configuration

- Navigate to Setup and search for your Site
- Open your B2B Store Builder
- Find Accordion layout for Checkout.
- Add Unzer Payment Form below Shipping section.
- Optionally relabel the payment button to "Pay".
- Publish changes in your B2B Store

The Clouderia solution for B2B Commerce delivers a robust and scalable payment processing framework, optimizing transaction workflows through seamless Unzer endpoint integration, configurable payment options, and asynchronous processing of payment data. This system empowers businesses to enhance the buyer experience, improve checkout performance, and streamline back-office operations.