

STEP 1

Download and install Bluefin Payment Processing app

STEP 2

Sign up for a Bluefin merchant account

Once you install the application, click the “Get Started” link from the home page to get in touch with our sales representatives.

STEP 3

Link Bluefin merchant account and Bluefin Payment Processing app

[*Click here for info on setting up an M-130 card reader*](#)

- 1) Once your merchant account is approved, you will receive a welcome email with a Gateway URL, an Account Id, and an API Access Key.
- 2) Enter this info under the Configuration menu and click “Save”
You are now all set to process cards!

STEP 4

Customize Bluefin Payment Processing app to meet the needs of your business

[*Click here for detailed documentation on customizing your application*](#)

The Bluefin Payment Processing app consists of four main components, each of which can be added to an account page layout:

- ✓ **Payments** – allows users to take a one-time payment, either using a stored card profile or a new card
- ✓ **Subscriptions** – allows users to setup recurring payments and view existing recurring payments
- ✓ **Transaction History**– Shows list of all transactions processed
- ✓ **Refunds** – shows refunds that have been issued, to issue refund users must navigate to original transaction

STEP 5

Start processing payments

[*Click here for info on processing payments*](#)

M130

Overview

The M-130 card reader, when used in conjunction with the Bluefin Payment Processing app, enables your company to run credit cards without any credit card data ever entering your computer. Bluefin's point to point encryption technology encrypts the credit card from the moment that it's swiped or keyed into the pinpad.

The Bluefin app's configuration tab contains the option of mandating that all transactions must be run using the M-130. This is recommended if every person in the organization that will be running transactions has access to an M-130. This can be done by selecting "External Device Required" under the Configurations tab.

Pros of using an M-130 at all times:

- Simplified PCI compliance process
- No card data would ever be stored or entered into your computer
- Utilizes P2P encryption which ensures your customer's data is safe

To use the M-130 in swiped mode:

1. Navigate to a payment or subscription page
2. Swipe card
3. Click process

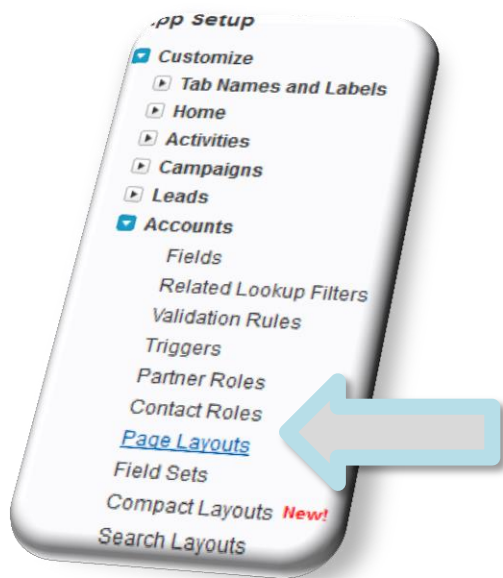
To use the M-130 in keyed mode:

1. Navigate to a payment or subscription page
2. Key in card info into M-130
3. Click process

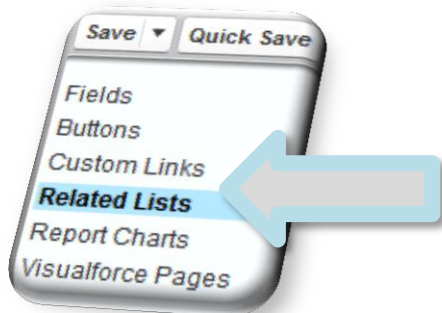
Customizing Application

Adding Bluefin Payment Processing features to account page layout

- 1) Once you are logged into Salesforce, click on your name then on “Setup”
- 2) Under the “App Setup” heading on the left, click on “Customize”, “Accounts”, then “Page Layouts”



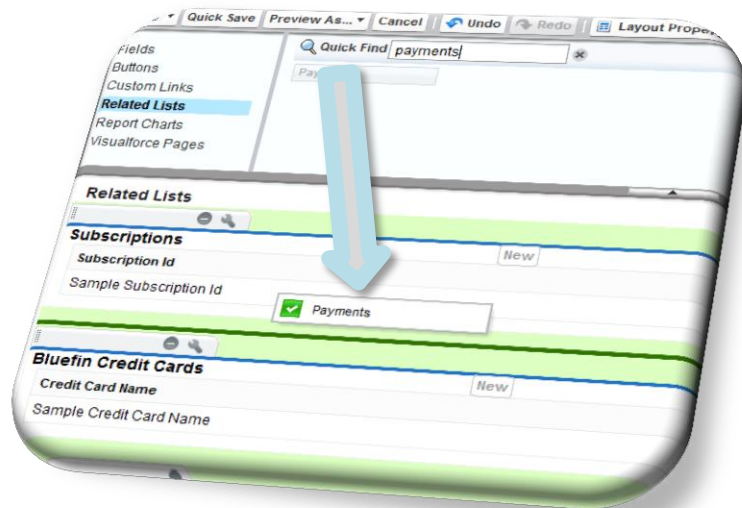
- 3) Click “Edit” next to the layout you want to change
- 4) Click on “Related Lists”




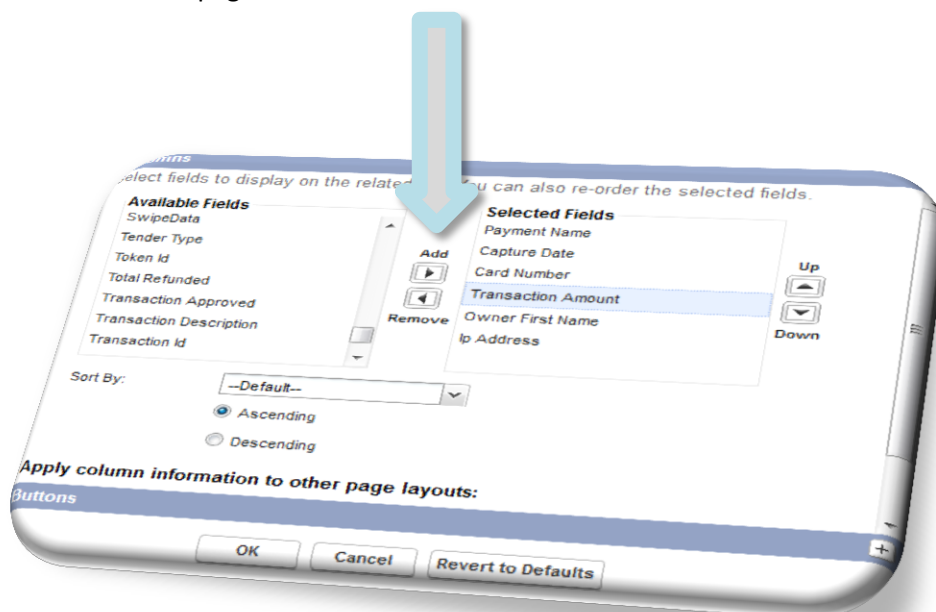
- 5) Based on what is relevant for your business, decide which of the five possible main features to drag onto your page layout

Options:

- ✓ **Payments** – allows users to take a one-time payment, either using a stored card profile or a new card
- ✓ **Subscriptions** – allows users to setup recurring payments and view existing recurring payments
- ✓ **Transaction History**– Shows list of all transactions processed
- ✓ **Refunds** – shows refunds that have been issued, to issue refund users must navigate to original transaction



- 6) Click the  picture of a tool next to each related list to select which fields will be displayed on the account page



7) You are done!

Payments

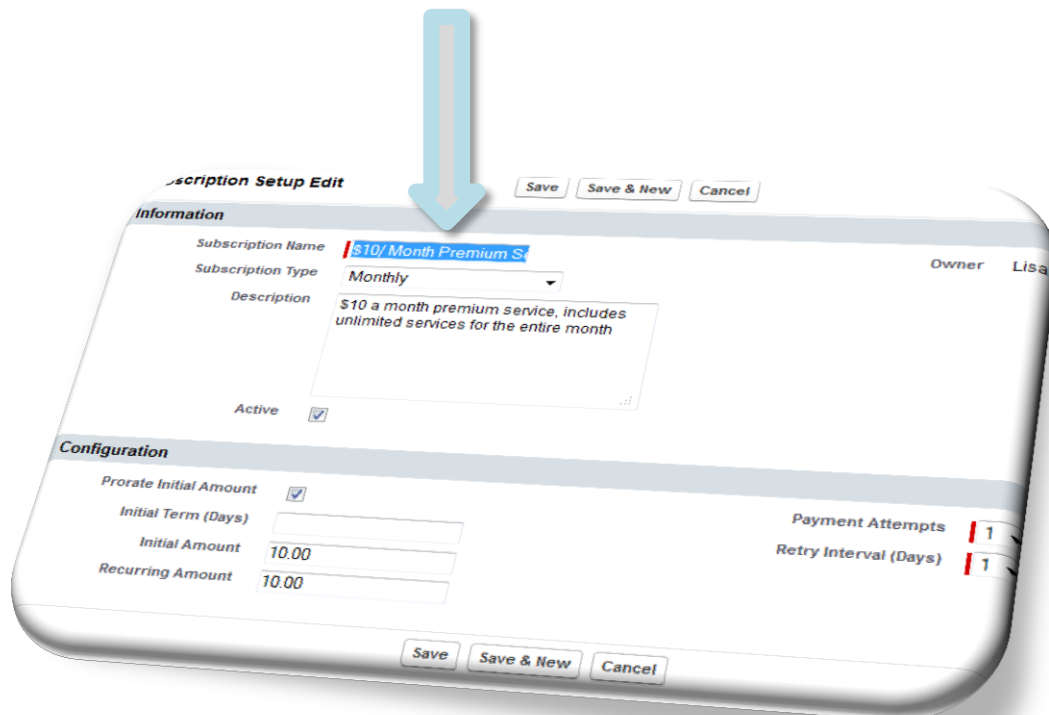
New Payment

Action	Payment Name	Capture Date	Card Number	Transaction Amount	Owner First Name
Edit Del	PMT-000007		*****9501		
Edit Del	PMT-000008		*****9501	\$1.00	Lisa
				\$1.00	Lisa

Setting up payment subscription programs

In order to charge recurring scheduled payments, you will need to setup a “Subscription Setup” template. To do this, follow the instructions below:

- 1) Navigate to the “Subscription Setup” section, either by clicking the tab by that name or clicking the “+” sign at the far right and then locating the link
- 2) Click “New”
- 3) Fill in all of the fields, making the subscription name as descriptive as possible, and click save
Click [here](#) for instruction for setting up a recurring charge



Subscription Setup Edit Save Save & New Cancel

Information

Subscription Name:

Subscription Type:

Description:

Active: ☒

Owner: Lisa

Configuration

Prorate Initial Amount: ☒

Initial Term (Days):

Initial Amount:

Recurring Amount:

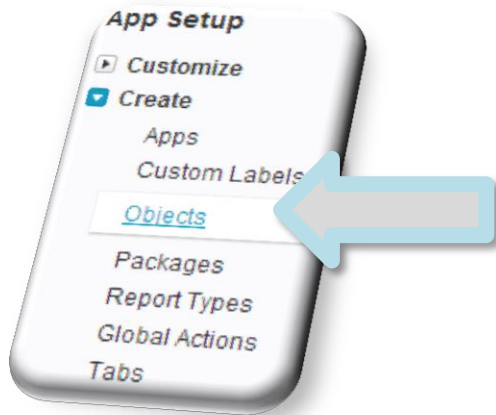
Payment Attempts:

Retry Interval (Days):

Save Save & New Cancel

Adding Custom Fields

- 1) Once you are logged into Salesforce, click on your name then on “Setup”
- 2) Under the “App Setup” heading, click “Create” and then “Objects”



- 3) Find the object you want to edit and click on it, in this example “Payment” is selected
- 4) Scroll down to the “Custom Fields & Relationships” section and click “New”



- 5) Select the type of field you want to create and click “Next”, in this example, we are selecting “Picklist”
- 6) Name the field and fill in required fields and click “Next”

Enter the data

Step 1

Field Label [i](#)

Enter values for the picklist, with each value separated by a new line.

☐ Sort values alphabetically, not in the order entered. Values will be displayed alphabetically everywhere.

☐ Use first value as default value

Field Name [i](#)

Description

Help Text [i](#)

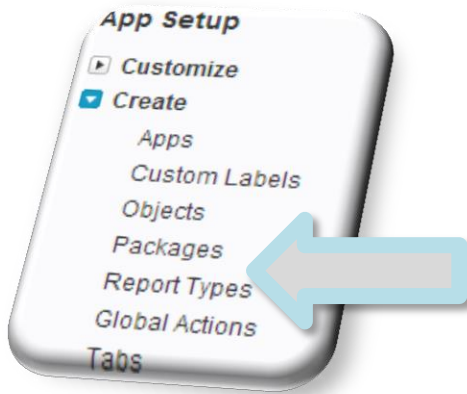
Previous Next Cancel

Previous Next

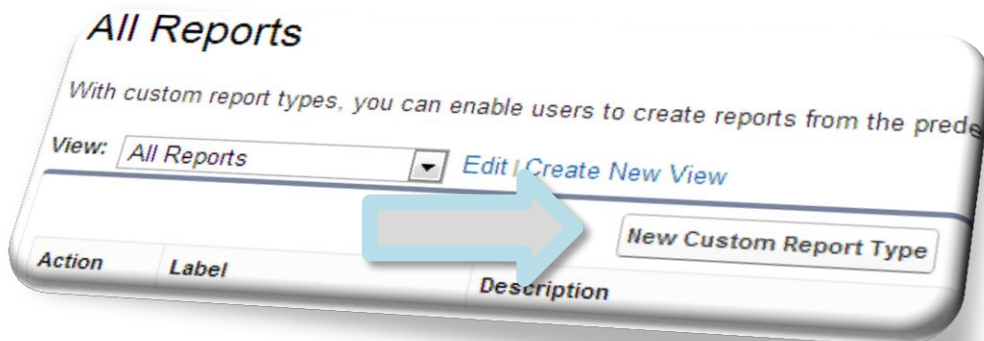
- 7) On the next screen, decide which user profiles should be able to view the field and click "Next"
- 8) Click Save

Creating a Bluefin Report Type

- 1) Once you are logged into Salesforce, click on your name then on "Setup"
- 2) Under the "App Setup" heading, click "Create" and then "Report Types"



- 3) Click "New Custom Report Type"



- 4) Select Primary Object, fill in the required fields, choose the "Deployed" checkbox, and click "Next". In this example we are choosing "Transaction History" to capture all transaction activity.

Report Type Focus Next

Specify what type of records (rows) will be the focus of reports generated by this report type.
 Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the primary object.

Primary Object Transactions

Identification

Report Type Label Bluefin Transaction History

Report Type Name Bluefin_Transaction_Histo

Description Report shows all transactions
Note: Description will be visible to users who create reports.

Store in Category Other Reports

Deployment


A report type with deployed status is available for use in the report wizard. While in development, reports are visible only to authorized administrators and their delegates.

Deployment Status ☐ In Development ☒ Deployed


Next

5) Click "Save"

6) Now, if you go to the "Reports" tab, you can create a new report showing all transaction activity

 **Create New Report**

Select Report Type

 Other Reports

Bluefin Transaction History

Bluefin Transaction History

Report Generation Status: Complete

Report Options:

Summarize information by: -None- Show All transactions

Time Frame

Date Field Created Date Range Current FQ
From 10/1/2013 To 12/31/2013

Run Report Hide Details Customize Save As Printable View Export Details

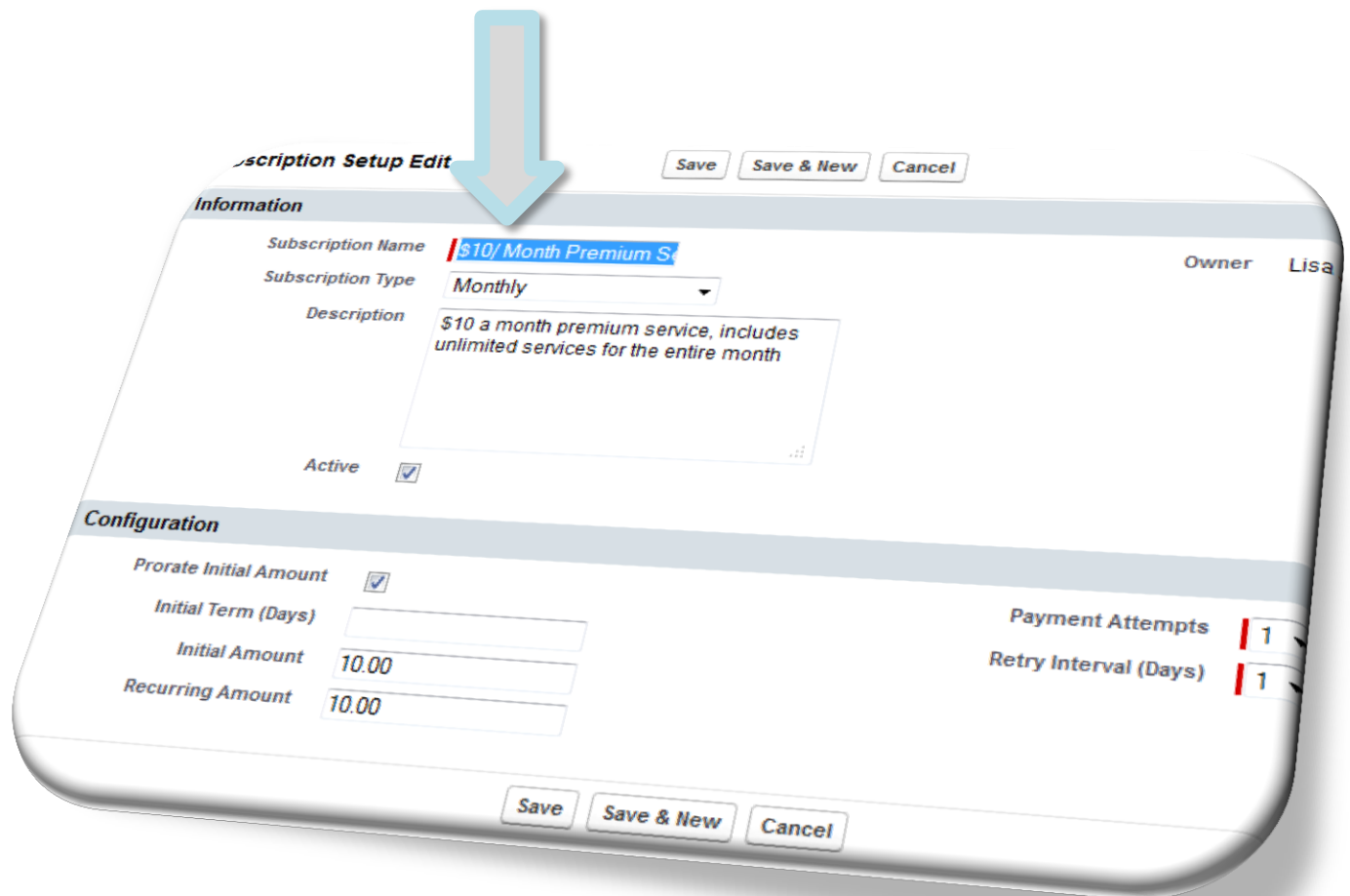
Bluefin Transaction Id	Account: Account Name	Card Number	Transaction Amount
00000000441	Test Account	*****1111	
00000000461	Joe Tester	*****1111	\$45.00
00000000481	ELAVON CERTIFICATION-DISC	*****0004	\$13.00
00000000501	Mike's Test Company	*****9501	\$123.00
a1DJ000000020xm		*****1111	-
a1DJ000000020xr		*****1111	-
00000000521	Joe Tester	*****1111	-
00000000541	Joe Tester	*****1111	\$9.03
00000000581	Joe Tester	*****1111	\$5.00
00000000601	test trev	*****1111	\$13.00
00000000621	Mike's Test Company	*****5454	\$1.05
00000000641	Mike's Test Company	*****9501	\$1.00
00000000661	Mike's Test Company	*****9501	\$1.00
00000000681	Joe Tester	*****9501	\$1.00
00000000701	Joe blow	*****2349	\$123.00
Grand Totals (15 records)		*****1111	\$5.00

Processing Payments

Setting up payment subscription programs

In order to charge recurring scheduled payments, you will need to setup a "Subscription Setup" template. To do this, follow the instructions below:

- 1) Navigate to the "Subscription Setup" section, either by clicking the tab by that name or clicking the "+" sign at the far right and then locating the link
- 2) Click "New"
- 3) Fill in all of the fields, making the subscription name as descriptive as possible, and click save



The screenshot shows the 'Subscription Setup Edit' form. A large blue arrow points to the 'Subscription Name' field, which contains the text '\$10/ Month Premium S'. The form is divided into two main sections: 'Information' and 'Configuration'.

Information Section:

- Subscription Name:** \$10/ Month Premium S
- Subscription Type:** Monthly
- Description:** \$10 a month premium service, includes unlimited services for the entire month
- Active:** ☒

Configuration Section:

- Prorate Initial Amount:** ☒
- Initial Term (Days):**
- Initial Amount:** 10.00
- Recurring Amount:** 10.00
- Payment Attempts:** 1
- Retry Interval (Days):** 1

Buttons at the top: Save, Save & New, Cancel. Buttons at the bottom: Save, Save & New, Cancel. Owner: Lisa

Running a payment

- 1) Navigate to the Payments object, either by locating it on the account page, clicking on the tab, or clicking the “+” on the far right and locating the link
- 2) Click “New Payment”
- 3) Fill in the required fields, other relevant fields, and click “Process”