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:

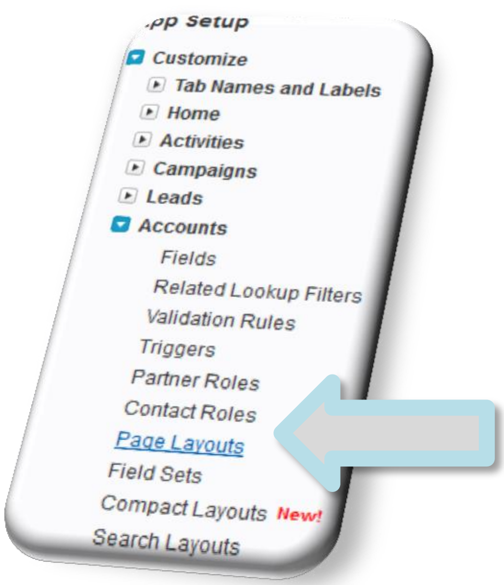
1. Navigate to a payment or subscription page
2. Key in card info into M-130
3. Click process

Customizing Application

Adding Bluefin Payment Processing features to account page layout

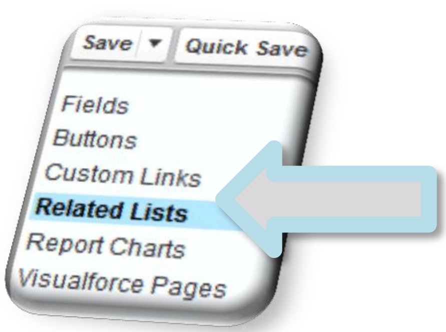
1) Once you are logged into SalesForce, click on your name then on “Setup”

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

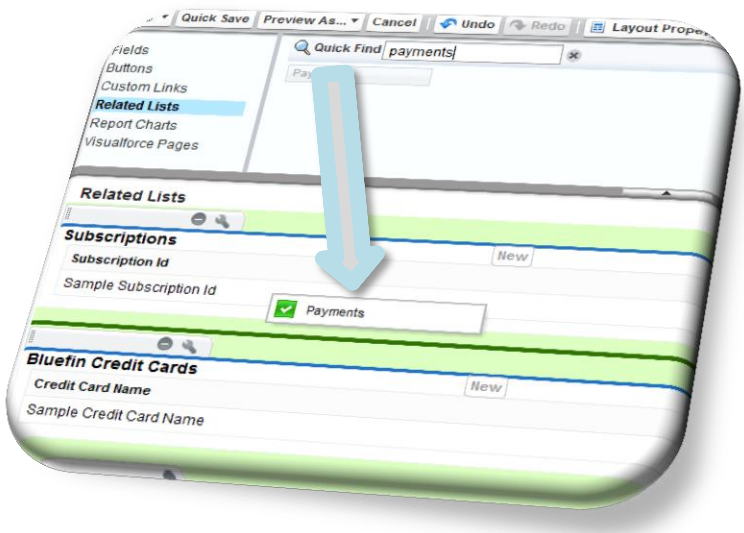
4) Click on “Related Lists”



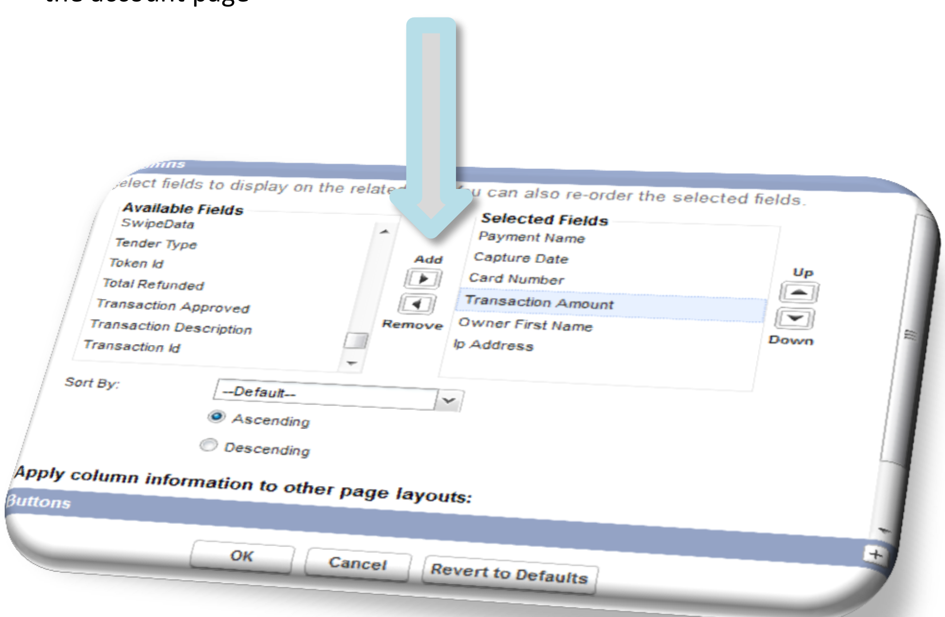
5) Based on what is relevant for your business, decide which of the five possible main features to drag onto your page layout

Options:

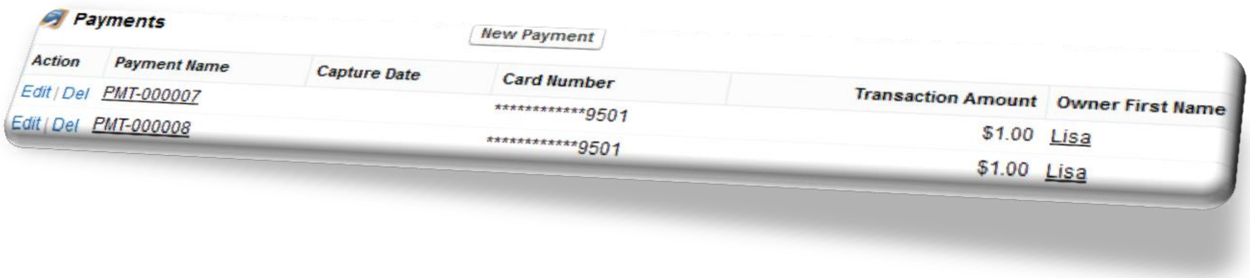
- ✓ **Payments** – allows users to take a one-time payment, either using a stored card profile or a new card
- ✓ **Subscriptions** – allows users to setup recurring payments and view existing recurring payments
- ✓ **Transaction History**– Shows list of all transactions processed
- ✓ **Refunds** – shows 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!



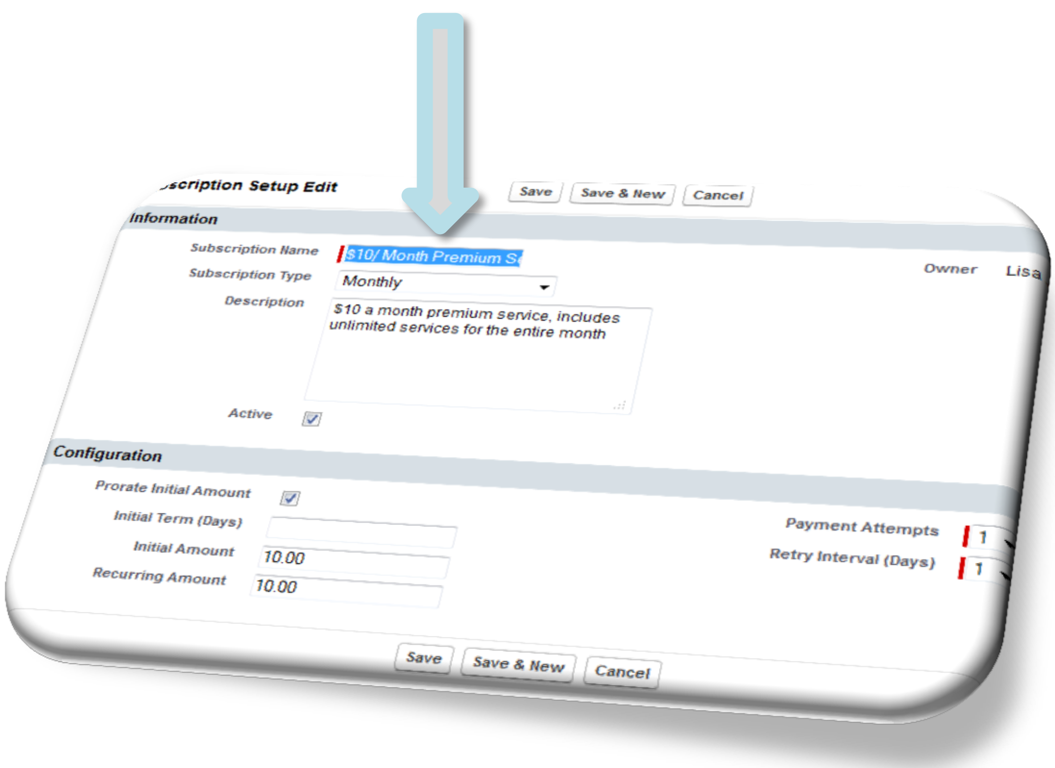
Setting up payment subscription programs

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*



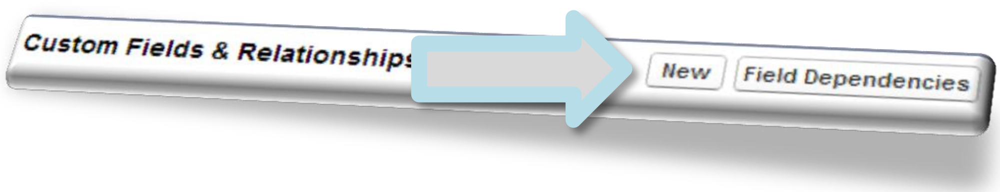
Adding Custom Fields

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"

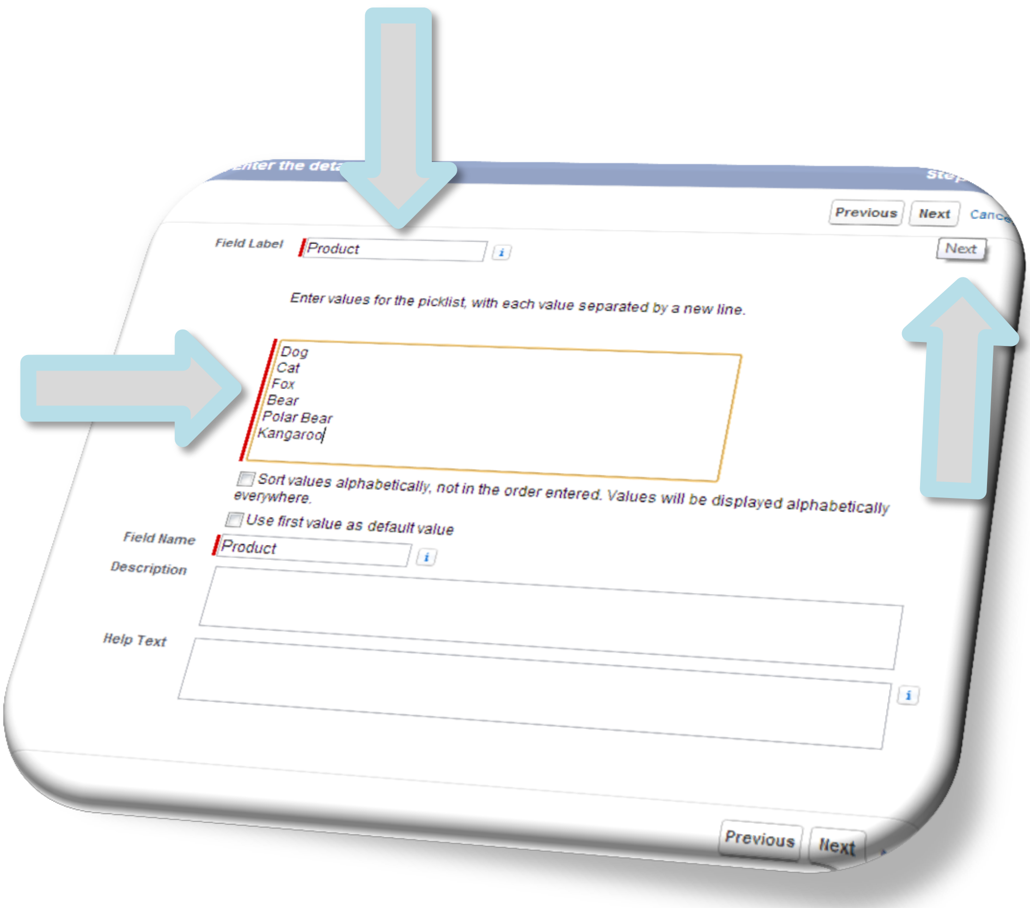
3) Find the object you want to edit and click on it, in this example "Payment" is selected

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"



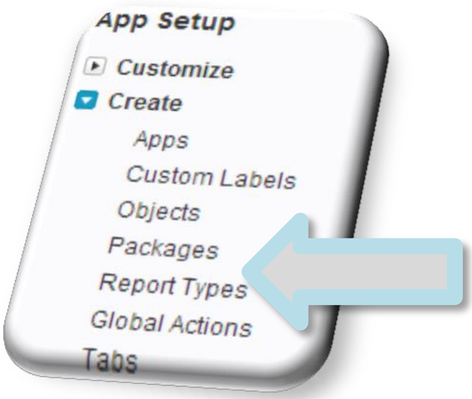
7) On the next screen, decide which user profiles should be able to view the field and click “Next”

8) Click Save

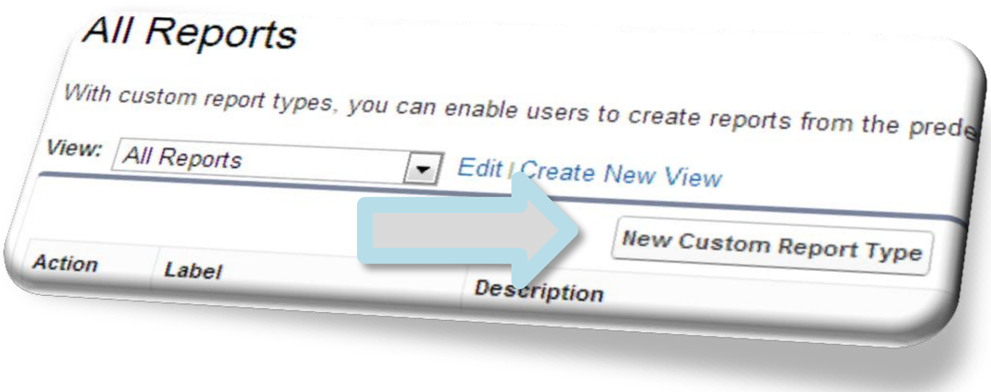
Creating a Bluefin Report Type

1) Once you are logged into SalesForce, click on your name then on “Setup”

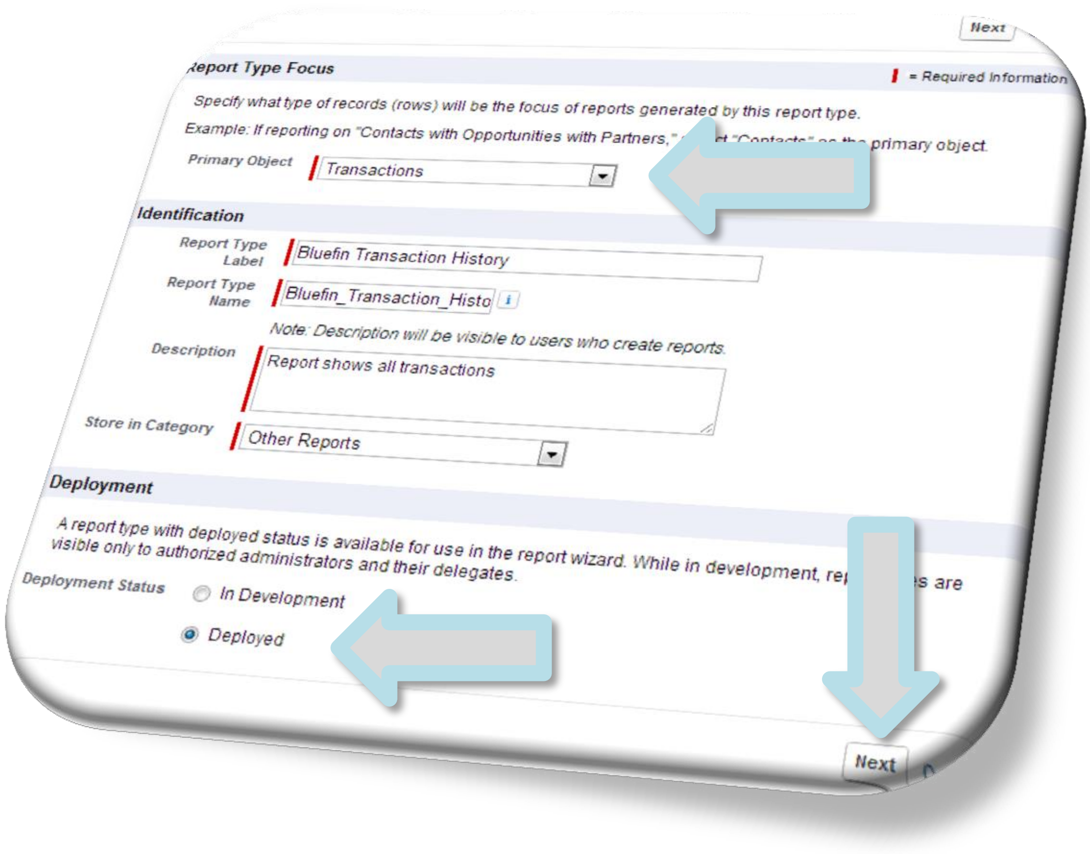
2) Under the “App Setup” heading, click “Create” and then “Report Types”



3) Click “New Custom Report Type”

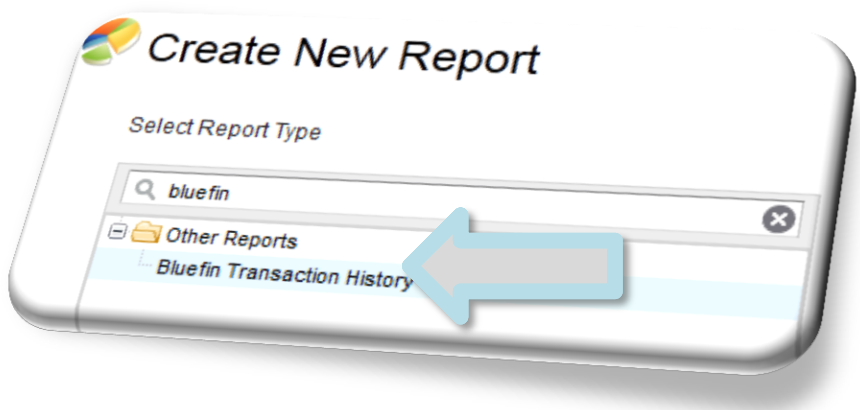


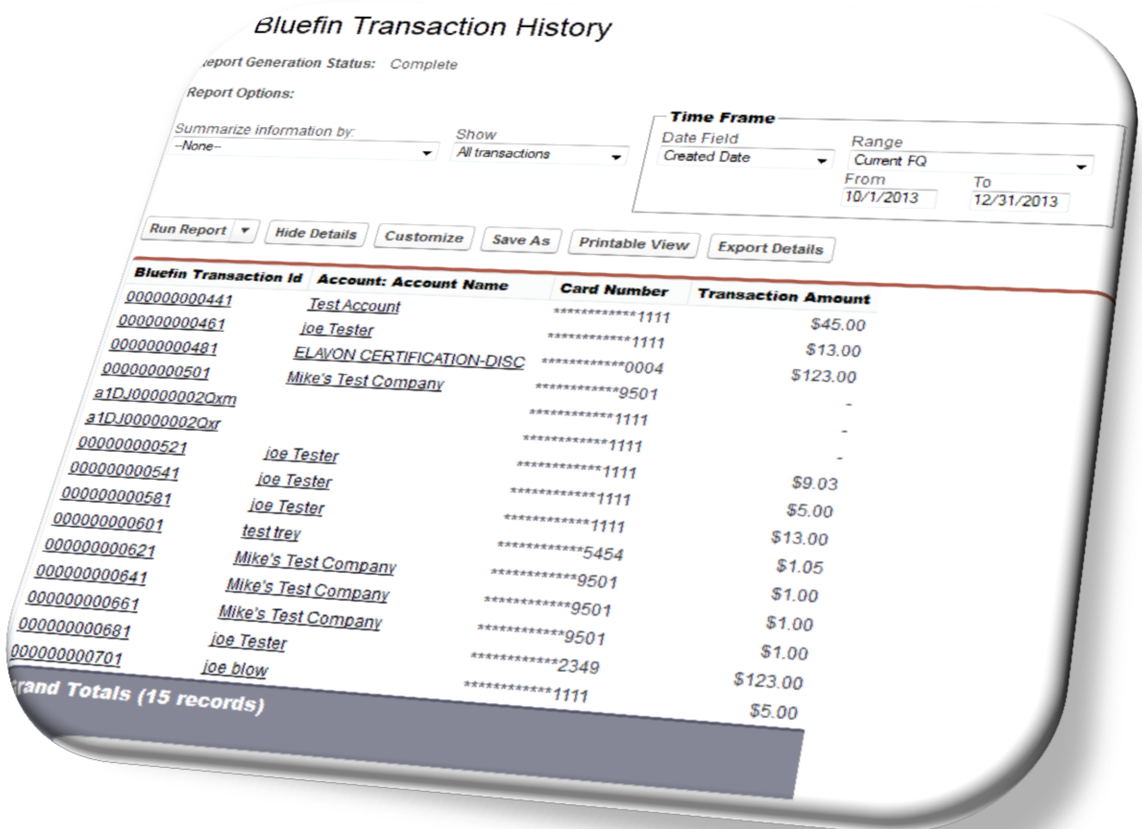
4) Select Primary Object, fill in the required fields, choose the “Deployed” checkbox, and click “Next”. In this example we are choosing “Transaction History” to capture all transaction activity.



5) Click “Save”

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





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
000000000441	Test Account	************1111	$45.00
000000000461	joe Tester	************1111	$13.00
000000000481	ELAVON CERTIFICATION-DISC	************0004	$123.00
000000000501	Mike's Test Company	************9501	-
a1DJ00000002Oxm		************1111	-
a1DJ00000002Oxr		************1111	-
000000000521	joe Tester	************1111	$9.03
000000000541	joe Tester	************1111	$5.00
000000000581	joe Tester	************1111	$13.00
000000000601	test trey	************1111	$1.05
000000000621	Mike's Test Company	************5454	$1.00
000000000641	Mike's Test Company	************9501	$1.00
000000000661	Mike's Test Company	************9501	$1.00
000000000681	joe Tester	************9501	$123.00
000000000701	joe blow	************2349	$5.00
		************1111	

rand Totals (15 records)

Processing Payments

Setting up payment subscription programs

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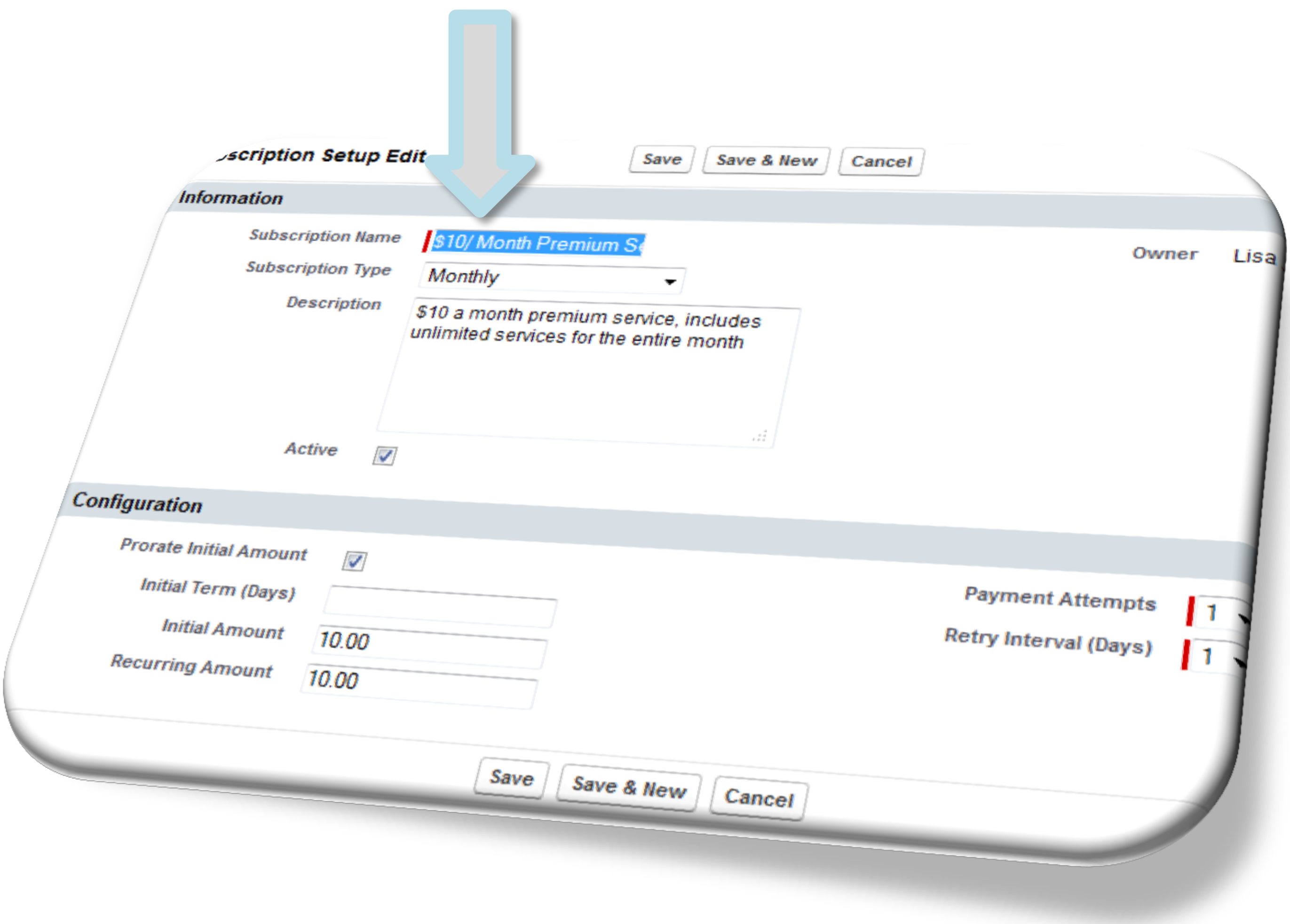
2) Click "New"

3) Fill in all of the fields, making the subscription name as descriptive as possible, and click save



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"