PayConex

For

salesforce

User Manual

Bluefin®
Payment Systems

User Manual v 1.0

Issued on 06/7/2016

Contents

Introduction

PayConex for Salesforce is brought to you by Bluefin Payment Systems, the first payments provider in the United States to receive PCI validation for a Point-to-Point Encryption (P2PE) payments solution in March 2014.

PayConex for Salesforce is Bluefin's fully integrated payment processing app that allows businesses to securely accept credit card transactions in both a card-present and card-not-present environment. PayConex is Bluefin's proprietary payment gateway which can be used independently as well as with the Salesforce app. When you setup an account with Bluefin, you will get a full-service payments system including the free Salesforce app, PayConex gateway, and merchant account all for a competitive price. We can generally match or beat your existing rates. Standard rates vary by processing volume, so contact us to discuss what we can offer you.

PayConex for Salesforce is backed by Bluefin's PCI P2PE solution. Bluefin's solution encrypts cardholder data at the Point of Interaction (POI) in a PCI-approved P2PE device and decryption is done off-site in an approved Bluefin Hardware Security Module (HSM). Our solution prevents clear-text cardholder data from being present in a merchant or enterprise's system or network where it could be accessible in the event of a data breach.

NOTE: *If you are not sure if the app will meet your needs or if you require a lot of customization, contact us at 800-675-6573 to discuss getting you setup with a test account to try it out. A test account is exactly like a live account, except that it does not allow you to run real credit card transactions.*

Bluefin's support department is equipped to troubleshoot and help with issues related to the functionality of our application only. For general Salesforce help or help with components not related to the Bluefin Payment application, we recommend utilizing Salesforce web resources, contacting Salesforce, or hiring a Salesforce administrator. Please note that all Salesforce customizations referenced in this manual do not require any computer programming skills, just Salesforce administration knowledge and general technical acumen.

Contact Information

PHONE: 800-675-6573 Option 2

EMAIL: service@bluefin.com

ESCALATION EMAIL: servicemanagers@bluefin.com

Response Times

PHONE: Average hold time is 30 seconds; hold times over two minutes are rare

VOICEMAIL: Call back within four hours during business hours

EMAIL: Response within 24 hours

Hours

Monday – Friday: 7:00 am – 6:00 pm Central
Saturday: 8:00 am – 4:30 pm Central

For the PayConex manual, support help and more, visit [www.bluefin.com/merchant-support.](http://www.bluefin.com/merchant-support)

How it Works

- Card data is swiped or keyed on a PCI-Validated P2PE device and immediately encrypted
- The transaction is recorded in Salesforce and attached to any custom or standard object
- Card data is processed through PayConex and only decrypted once it reaches Bluefin's secure servers

NOTE: *Contact Bluefin for an unmanaged version if you would like to program it to work other than illustrated above.*

The PayConex app consists of five custom objects that can be linked to any existing standard or custom objects:

1. **Payments** – Allows users to take a one-time payment, either using a stored card profile or a new card
2. **Subscriptions** – Allows users to setup recurring payments and view existing recurring payments
3. **Transaction History** – Shows a list of all transactions processed
4. **Refunds** – Shows refunds that have been issued; to issue refunds, users must navigate to the original transaction
5. **Payment Method** – Saves the tokenized version of the card, allowing you to reissue the transaction without re-entering the card information

Features

- Recurring billing
- Credit card acceptance
- ACH acceptance
- 100% Native app
- Issue refunds or reissue transactions within Salesforce
- Option of purchasing encrypted card reader either to swipe cards, or key cards.

  NOTE: *This is strongly recommended. Without doing this, you are allowing unmasked credit card numbers to enter your network.*

  - Card reader uses PCI-Validated P2PE that all data is encrypted in the device and not decrypted until it reaches Bluefin's servers – thus preventing clear-text card data from entering the merchant network or system
  - Network would be out of PCI-scope so that no PCI scan would need to be done on the computer

- Custom fields and custom reporting
  - **EXAMPLE**: You could create a dropdown field with a list of products and then create a report totaling how many of each product were sold
  - **EXAMPLE**: You could create custom reports showing which users are running the most transactions
  - **EXAMPLE**: You could create custom reports that pull in fields from the account page, like # of transactions per region or $ total of transactions per account type.

*PayConex for Salesforce is compatible with the Professional, Enterprise, Unlimited, Developer, and Performance Editions.

Getting Started

1. **Download and install the PayConex app**

Visit pages 9-12 for detailed instructions

https://appexchange.salesforce.com/listingDetail?listingId=a0N30000000q5FXEAY

2. **Sign up for a Bluefin merchant account**

Call us at 800-675-6573, ext. 1, or visit https://my.cardconex.com/GO/

3. **Link your Bluefin merchant account and PayConex app**

Visit page 12 for configuration instructions

4. **Customize the app to meet the needs of your business**

Visit pages 23-27 for detailed instructions for customizing the app

5. **Start processing payments!**

FAQ's

Where in Salesforce can I use the app?

You can add it to any custom or native Salesforce object. You can also use the menu in the right corner to go into Bluefin "mode" where all of the tabs would be related to the app, such as configuration, Refunds, Subscription Setup, etc.

Is the app easy to use?

Just like everything related to Salesforce, the app works right out of the box but it is also fully customizable, which would require more advanced Salesforce knowledge.

What gateways is it compatible with?

Our app is only compatible with PayConex, Bluefin's own proprietary gateway.

Can I run a transaction and tie it to an account or opportunity record?

Yes. Transactions can be added to any standard or custom objects.

Is the app an object?

Yes, and it can be edited just like other custom objects.

Can I customize the app for my business?

Yes, the app is a fully customizable object in Salesforce. If you need to customize it beyond object and field customizations, contact us to request an unmanaged version of the app.

Can I create Salesforce reports using the data from the app?

Yes, you can create reports. You can also add customized fields to the app and include them on reports as well.

Can I connect the app to my existing merchant account?

Possibly – but the most cost-effective way to use the app would be to setup a new account with Bluefin. If your merchant account is not with us, we will charge a much higher fee for PayConex than we would otherwise. Contact us for details.

Document Notes

1) As PayConex for Salesforce is a series of custom objects, **customization** instructions are the same as they would be for any custom object. Pages 23-27 will not be necessary for experienced Salesforce administrators. Those new to Salesforce should note that **they can apply most of these customizations to any Salesforce object**, not just those in this app.

2) Salesforce Setup menus **vary slightly** depending on specific Salesforce subscription and time of enrollment.
    a. **“Navigate to setup”** is always in the right corner of the screen and is accessed one of two ways:
        i. Click on your name, then “Setup” underneath your name
        ii. Click on “Setup” next to your name
    b. **“Navigate to custom object”** is done after first navigating to setup and then doing one of two things:
        i. Under “App Setup” heading, expand “Create”, click on “Objects”, then click on specific object
        ii. Under “Build” heading, expand “Create”, click on “Objects”, then click on specific object

3) The customization instructions in this manual generally require **administrator access**

4) Bluefin’s **support department** is equipped to troubleshoot and help with issues related to the functionality of our application only. For general Salesforce help or help with components not related to the Bluefin Payment application, we recommend utilizing **Salesforce web resources**, contacting Salesforce, or hiring a Salesforce administrator. Please note that all Salesforce customizations referenced in this manual **do not require any computer programming skills,** just Salesforce administration knowledge and general technical acumen.

Installation/Updating

Please refer to the steps below for instructions on installing the PayConex for AppExchange Sandbox and Production Accounts or updating your existing app.

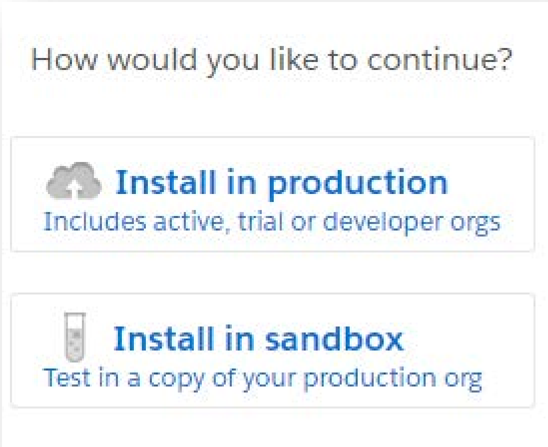
NOTE: *You can obtain a free developer account to test installing and uninstalling the package. Visit https://developer.salesforce.com/signup and follow the on-screen instructions.*

1) Download PayConex in the AppExchange store at https://appexchange.salesforce.com/listingDetail?listingId=a0N30000000q5FXEAY

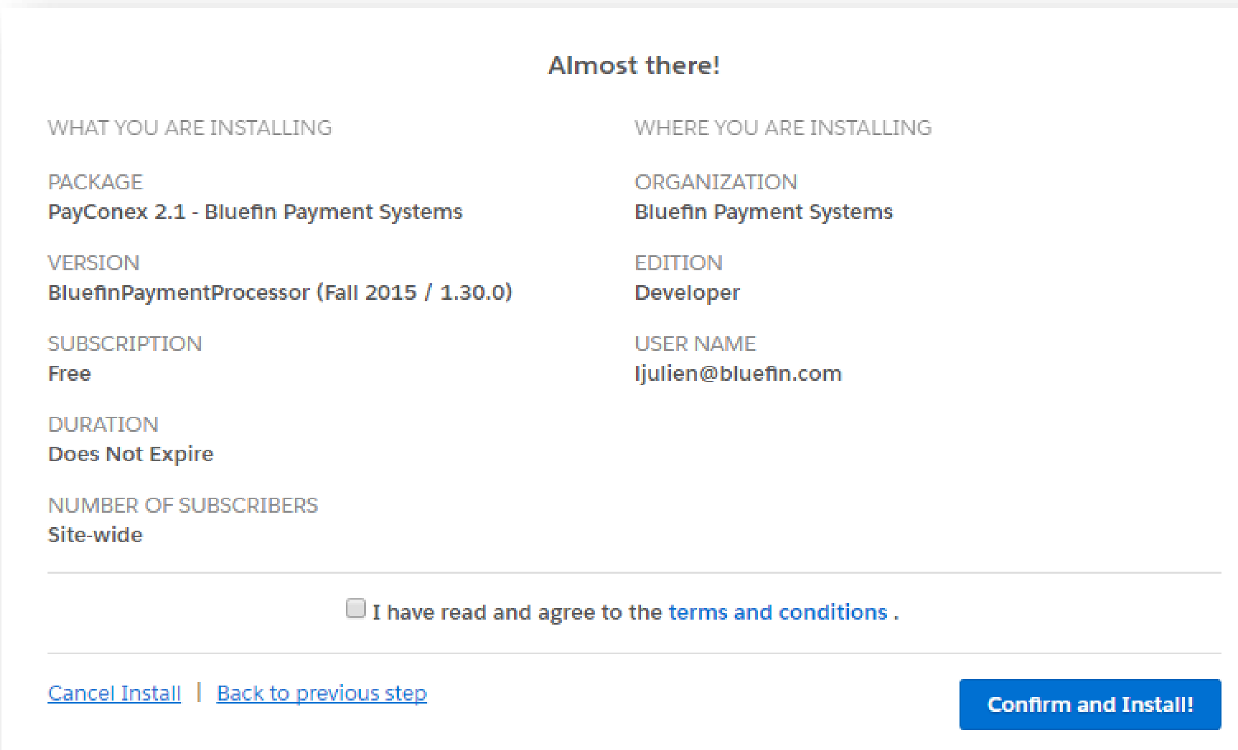
2) Click on “Get it Now”

3) If you haven’t done so already, login with your existing SFDC credentials or the credentials that were created in the developer account section.

4) Click on Install in Production

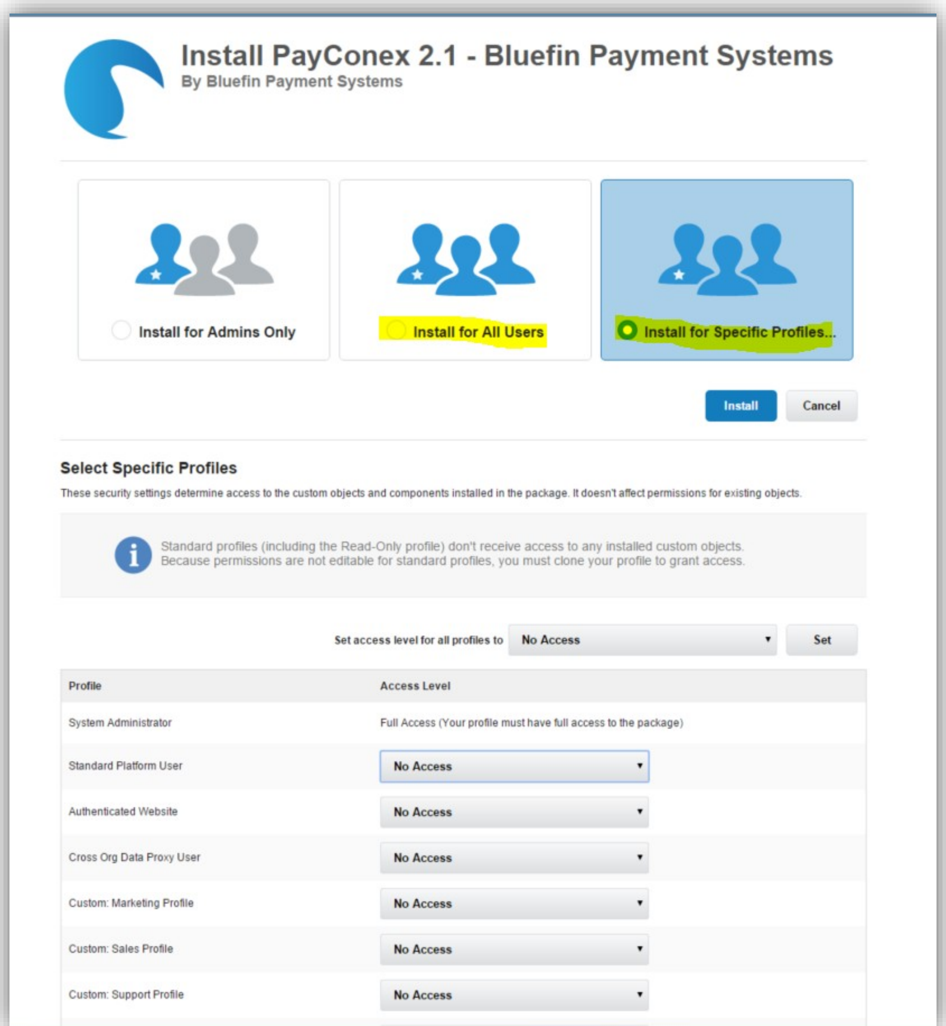


5) Read and accept SFDC terms and conditions then click Confirm and Install

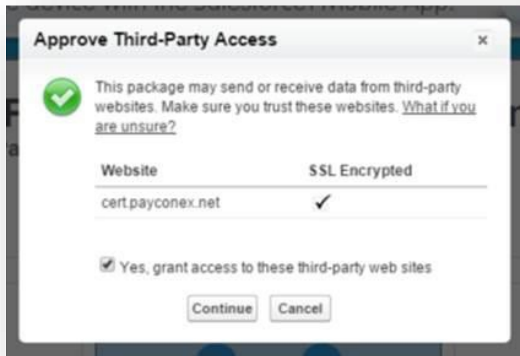


6) You will be prompted to log back into SFDC for the changes to take effect

7) User permission setting – Install for all users or select "Install for Specific Profiles" to restrict access to specified users

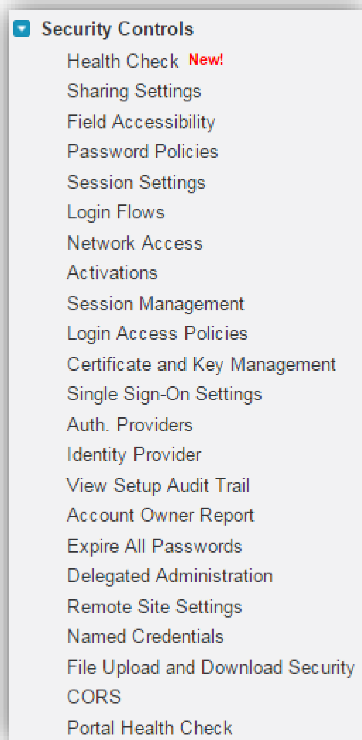

Install PayConex 2.1 - Bluefin Payment Systems
By Bluefin Payment Systems
Install for Admins Only
Install for All Users
Install for Specific Profiles...
Install
Cancel
Select Specific Profiles
These security settings determine access to the custom objects and components installed in the package. It doesn't affect permissions for existing objects.
Standard profiles (including the Read-Only profile) don't receive access to any installed custom objects.
Because permissions are not editable for standard profiles, you must clone your profile to grant access.
Set access level for all profiles to
No Access
Set
Profile
Access Level
System Administrator
Full Access (Your profile must have full access to the package)
Standard Platform User
No Access
Authenticated Website
No Access
Cross Org Data Proxy User
No Access
Custom: Marketing Profile
No Access
Custom: Sales Profile
No Access
Custom: Support Profile
No Access

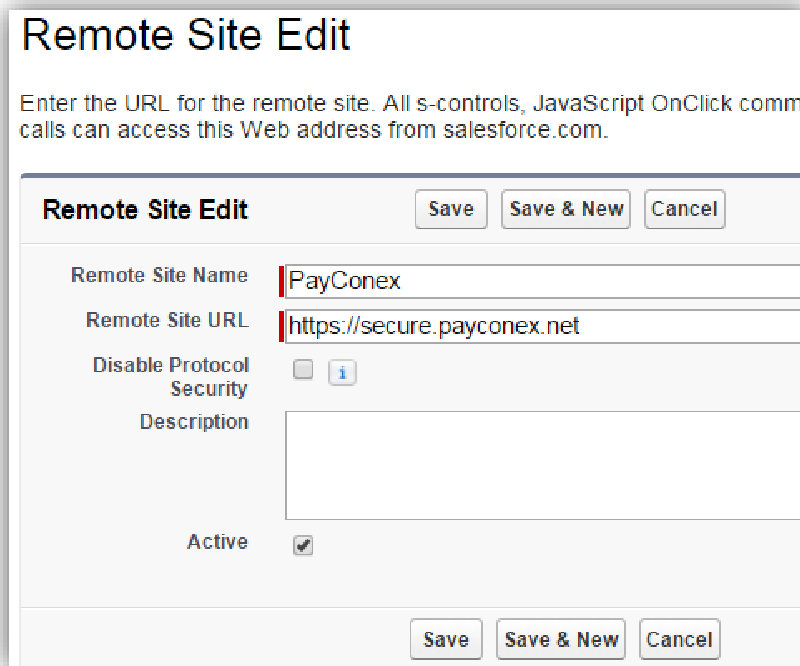
8) By default, the app points to cert.payconex.net. This is the Bluefin test system. This is done so that you can install the app in the Sandbox first and test it out against a Bluefin Sandbox account. The package prompts you to give your Salesforce instance access to cert.payconex.net. Check “Yes…” and click “Continue.”



**If you installed in an environment where you want a Bluefin Production Account, you must go to the Administration panel and add access to https://secure.payconex.net.*

9) Navigate to setup and go to “Remote Site Settings” and add in https://secure.payconex.net



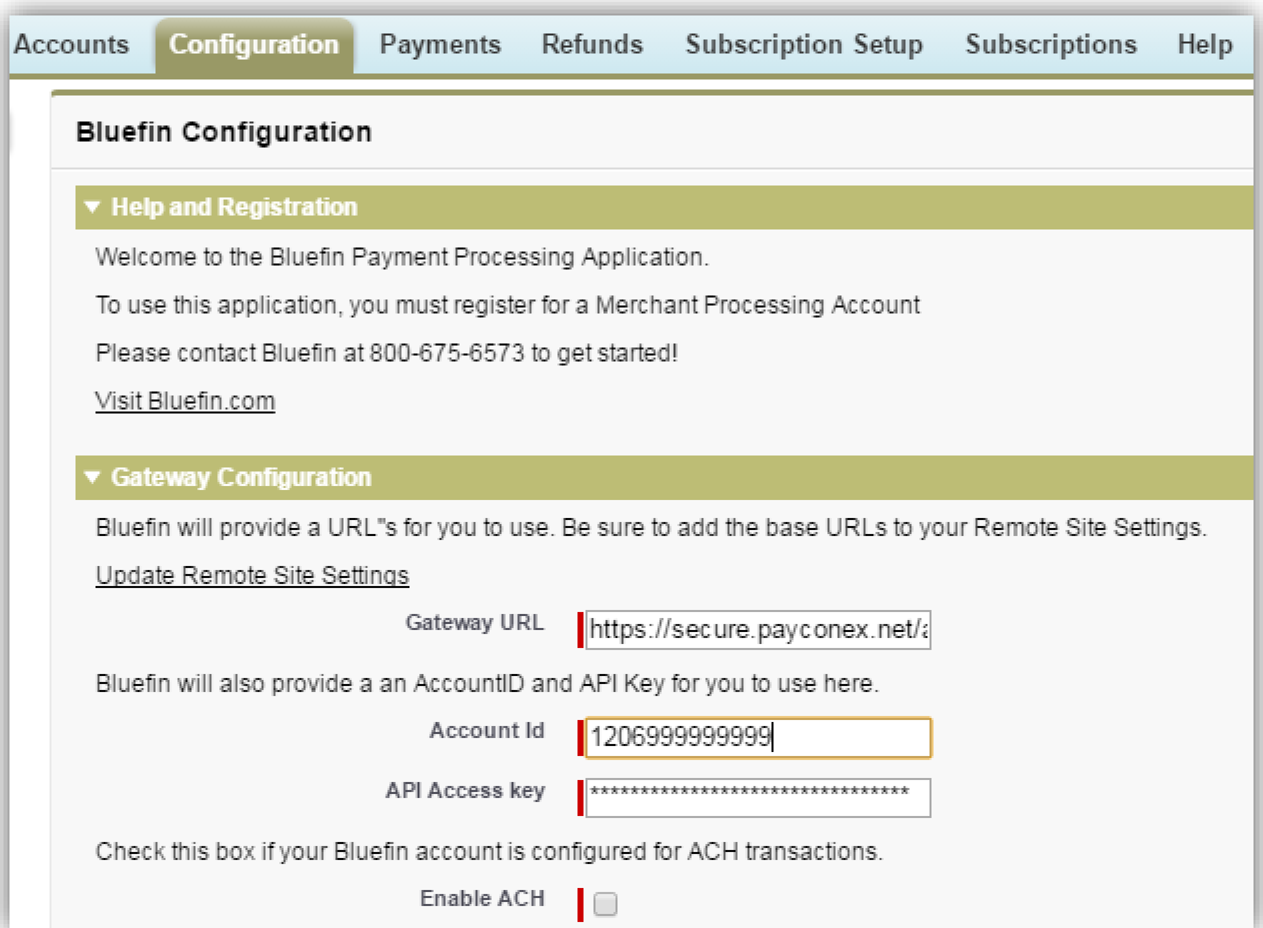


10) Lastly, you will need to go to the "Configuration" tab and ensure the fields below are populated with the correct URL and API Access Keys for the desired environment:

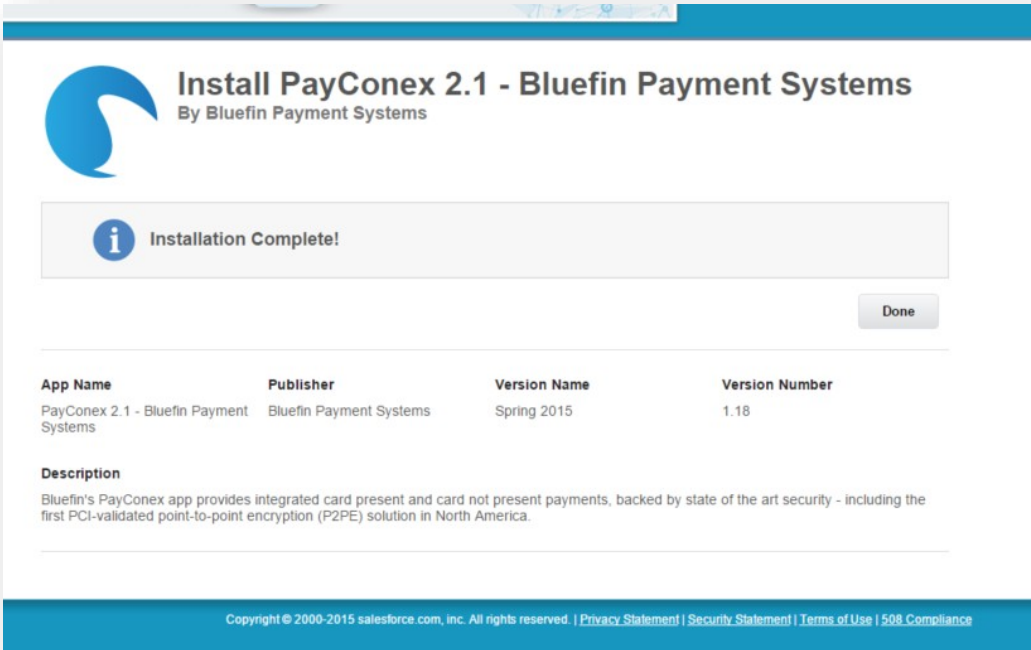
CERT: https://cert.payconex.net/api/qsapi/3.8

PRODUCTION: https://secure.payconex.net/api/qsapi/3.8

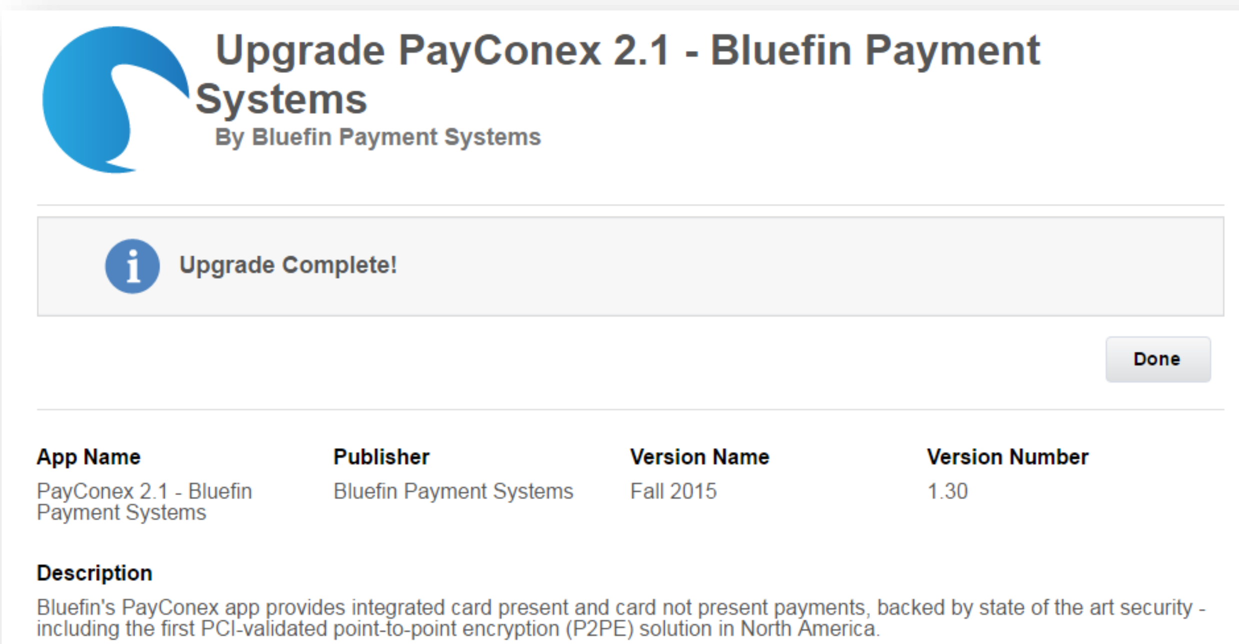
NOTE*: You must enter the correct API Access Key and Account ID for the correct environment. Your production API access key can be found in PayConex under "settings" and then "MANAGE SETTINGS."*



If you installed the package for the first time, you will get this screen:



If you upgraded your existing app:

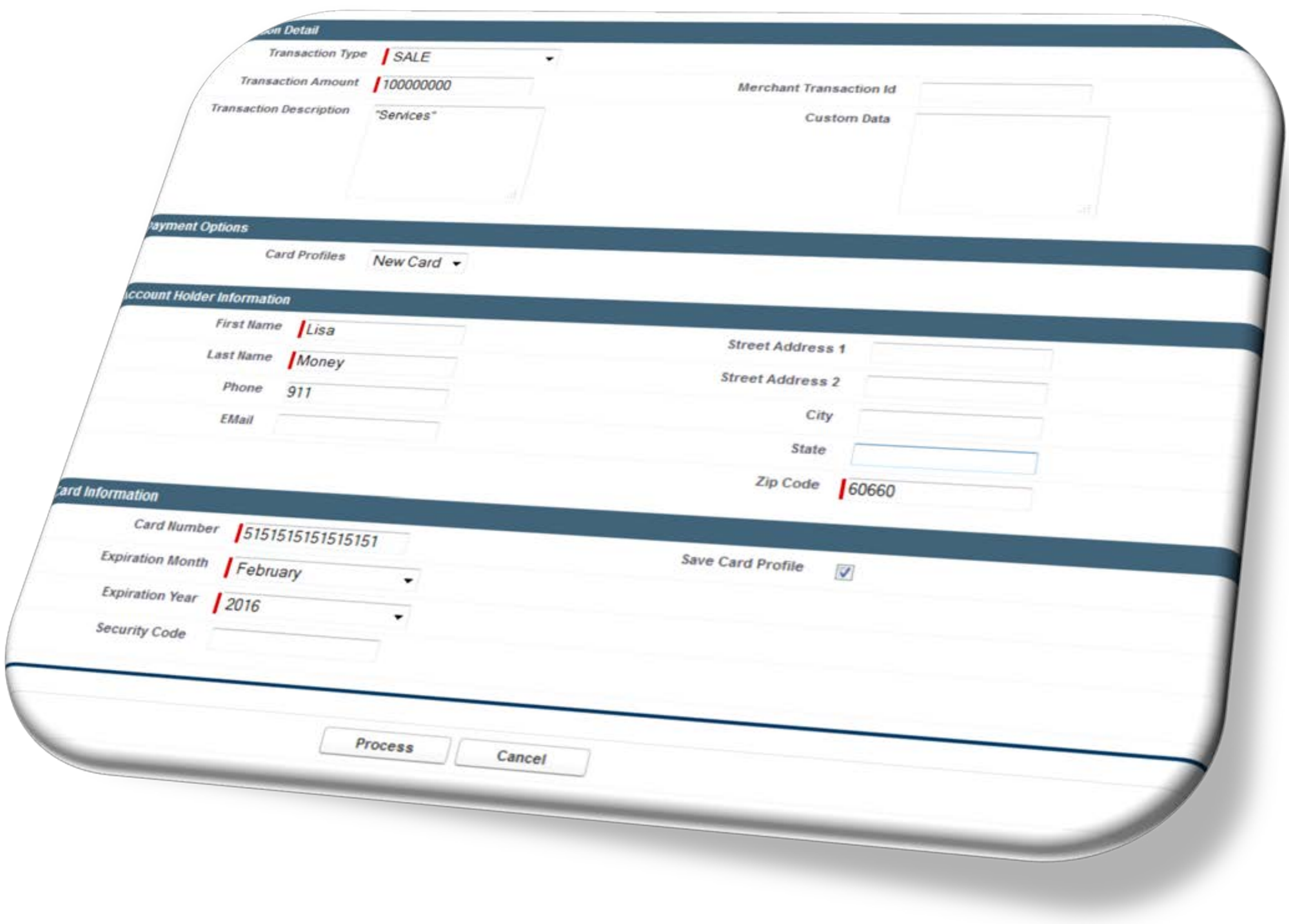


Basic Processing

Running a Payment

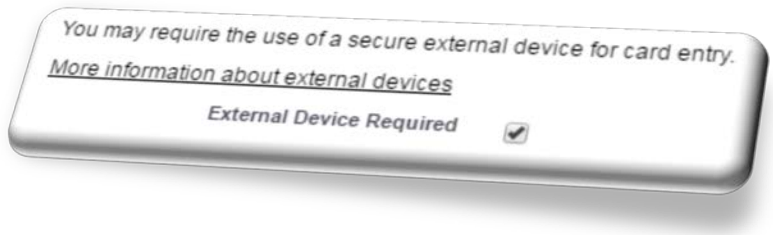
NOTE: *For instructions for using a device to take a payment, see the following pages.*

1) Navigate to the Payments object, either by locating it on a page where it has been added as a related list or by 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"

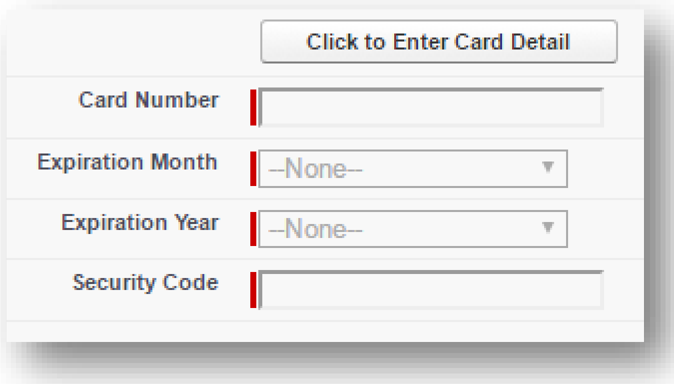


Using a Device

SETUP: *Navigate to the configuration menu while in the Bluefin app and mark "External Device Required"*

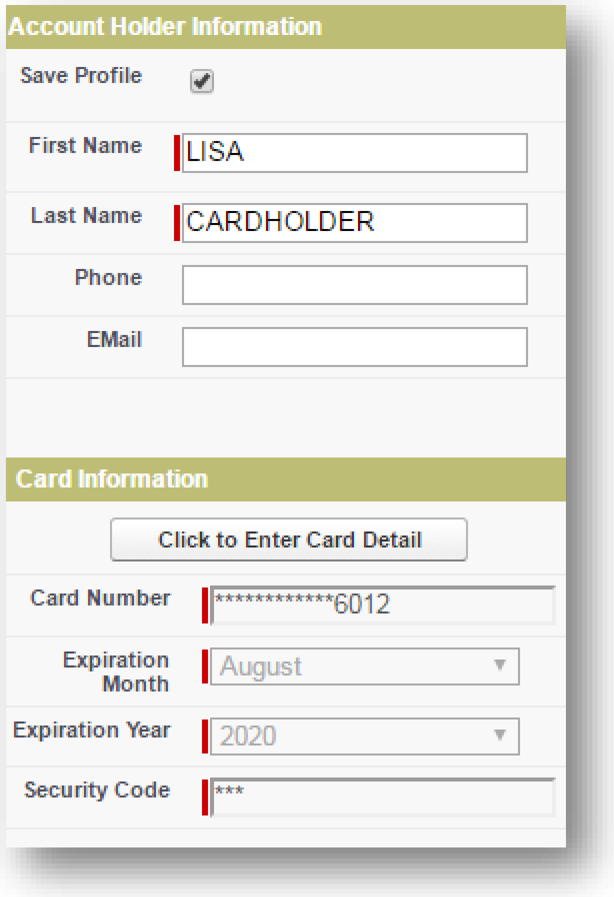


1) When running a payment, enter "Transaction Amount" then click "Click to Enter Card Detail"



2) Click on the blank space to the left of the cancel button

3) Key or swipe the card into the device
    a. **IF KEYING**: Enter the card number into the device, press enter, follow additional prompts and press enter after each one
    b. **IF SWIPING**: Swipe the card
4) The cardholder data will populate – if swiping, the name will populate; if keying – only the card data will populate



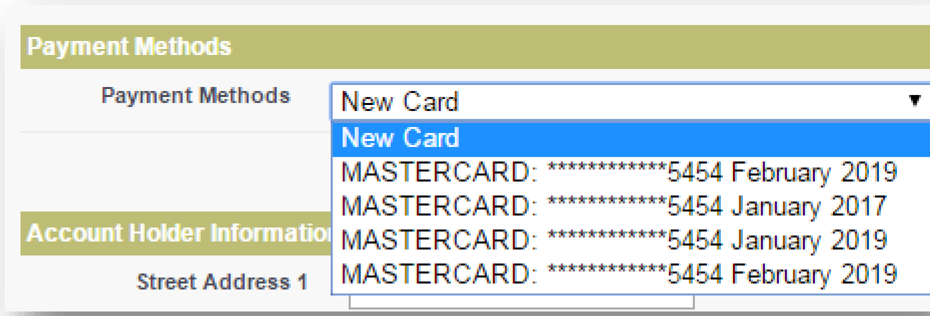
5) Enter additional information as needed

Reissuing a Payment

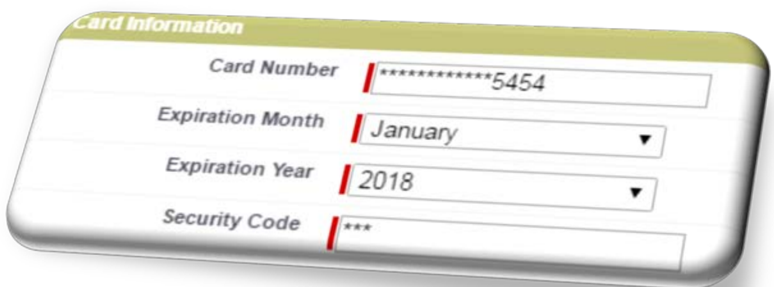
There are two ways to reissue a payment on the same card

OPTION 1:

1) Click “New Payment” on the object that payments are attached to (must be the same record as the one you originally took the payment on)
2) Under the “Payment Methods” drop down, select the card number you want to use



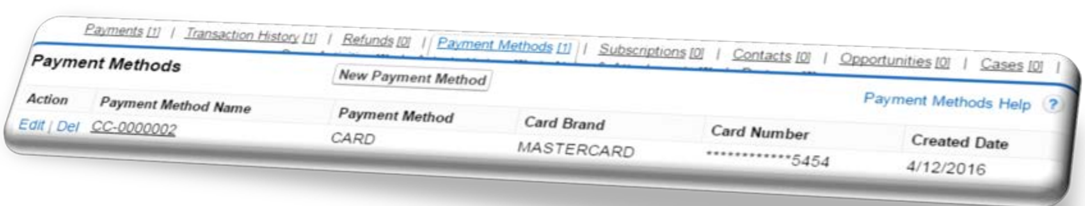
3) Card data will populate; enter the transaction amount and click “Process”



OPTION 2:

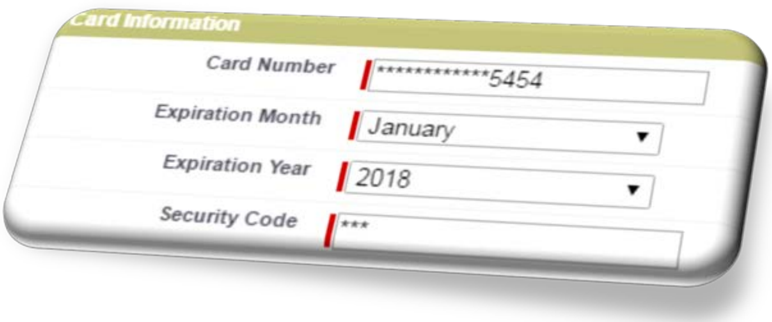
Payments can be reissued via the “Payment Method” object, which must be added to the same object as the one where the payment originated. For instructions for adding the object, see page 24.

1) Navigate to the “Payment Method” object and click on an existing payment record



2) Scroll down to “Payments” section
3) Click “New Payment”

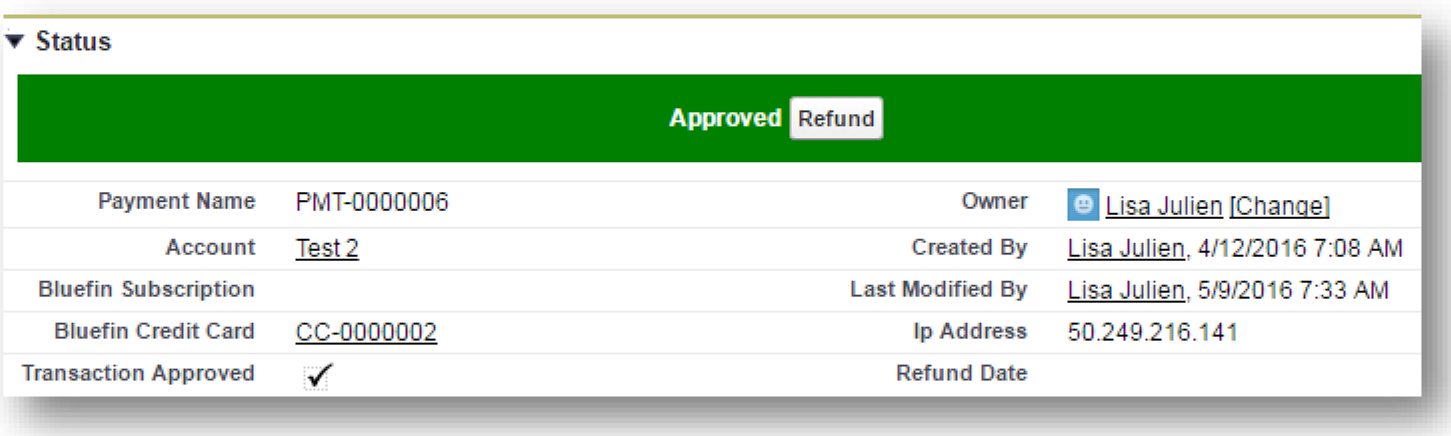
4) The card data will be pre-populated. Fill in the transaction amount and click “Process.”



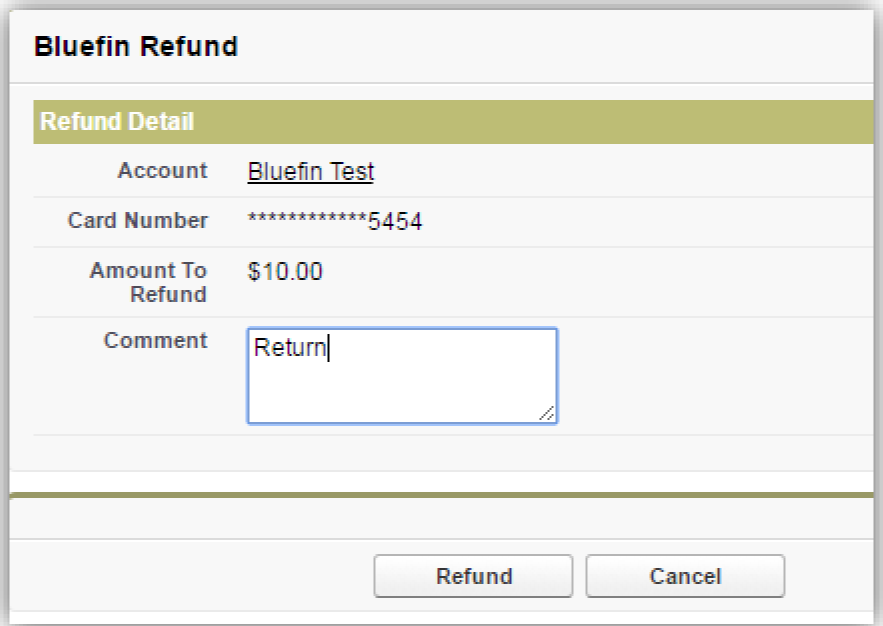
Refunding a Payment

For security reasons, only existing payments can be refunded

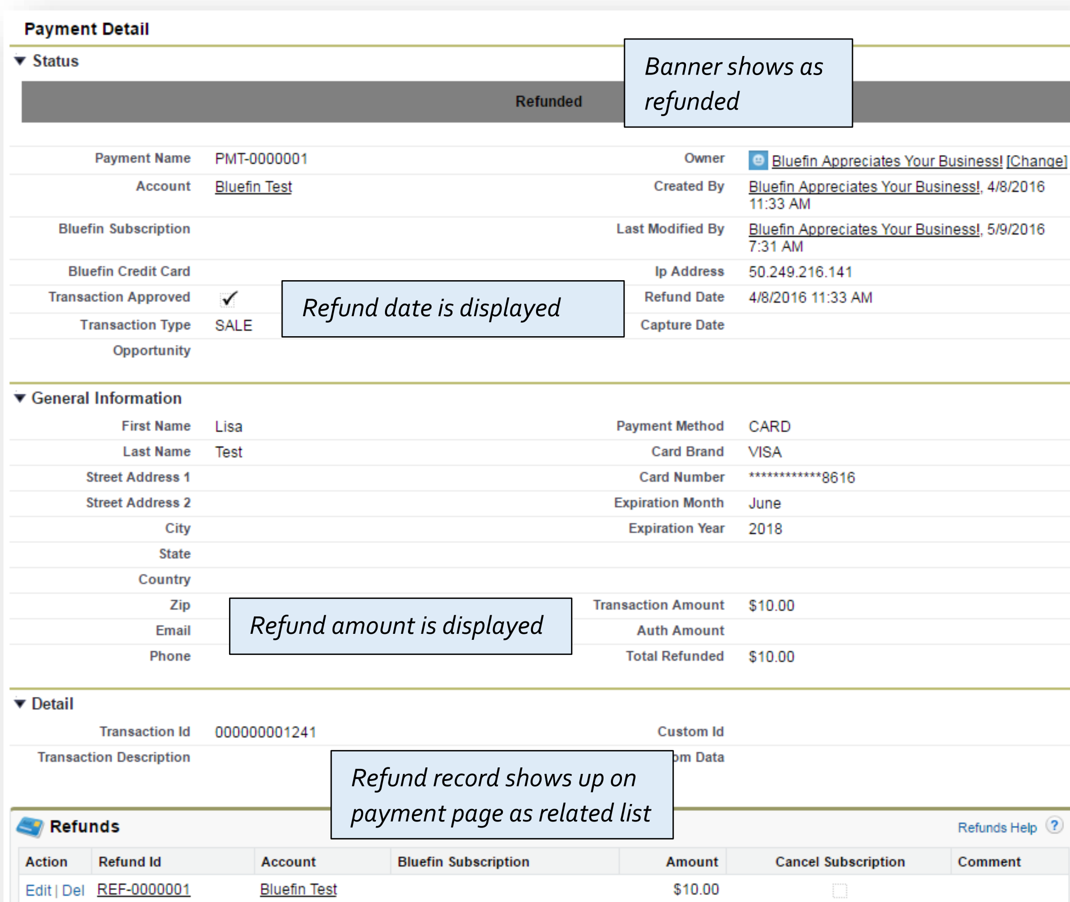
1) Navigate to the payment record
2) On the “Approved” banner, click “Refund”



3) On the next screen, click “Refund” again



Here is what a refunded payment looks like.



Voiding a Transaction

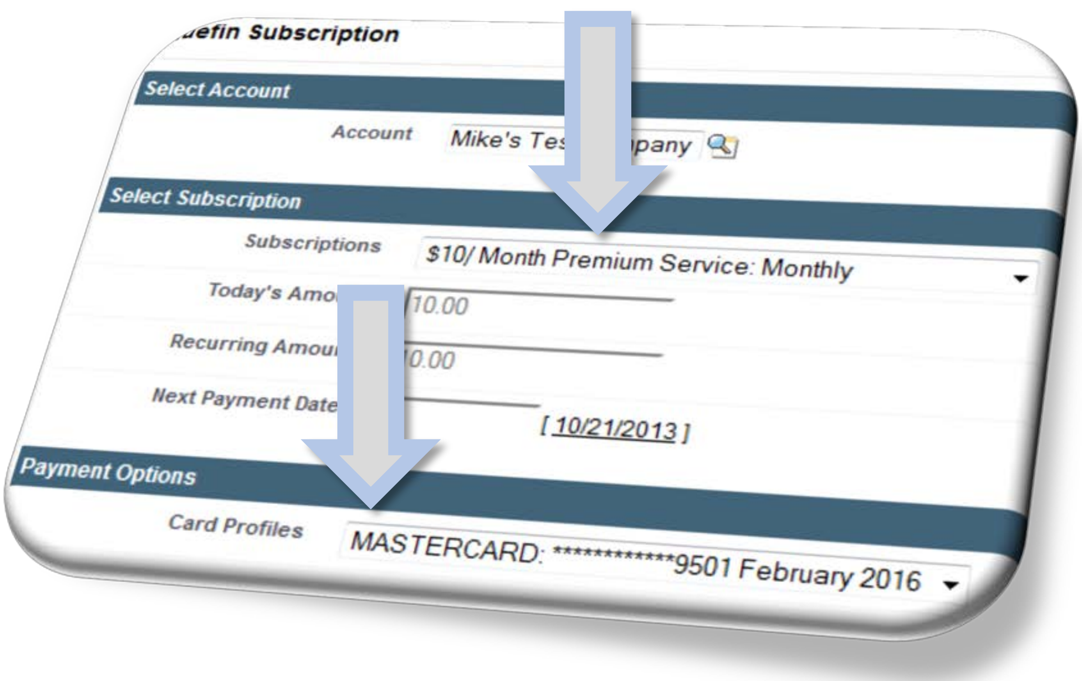
When a transaction is refunded before it is batched out, it is automatically issued as a void instead.

Issuing a Partial Refund

Partial refunds can only be issued within PayConex.

Scheduling a Subscription Payment

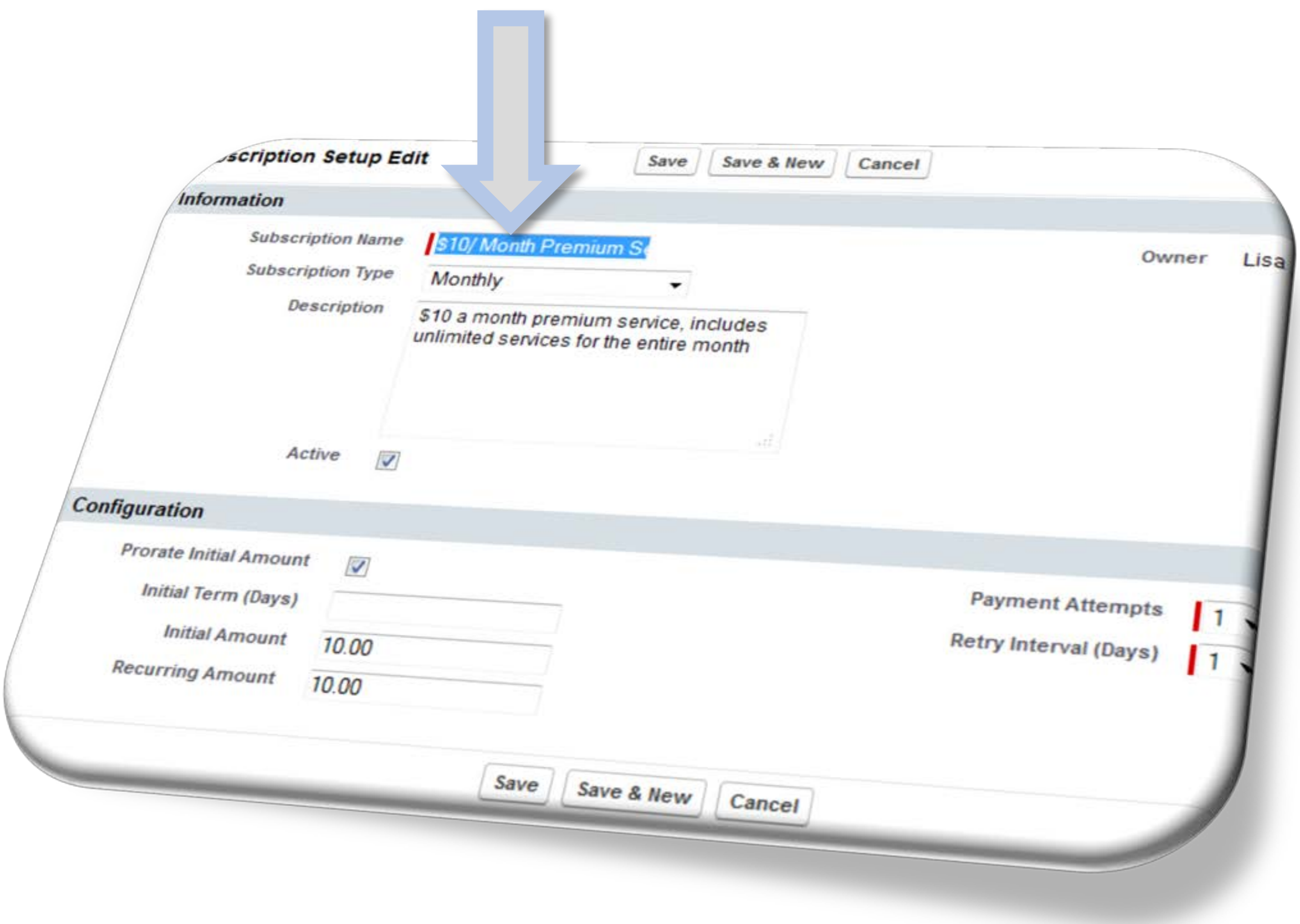
1) Navigate to the Subscriptions object, either by locating it on the account page, clicking on the tab, or clicking the "+" on the far right and locating the link
2) Click "New Subscription"
3) Select the appropriate subscription and card profile; make sure all of the fields are filled in and click "Save"



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. For instructions for setting up a recurring payment using one of these programs, see page 19.

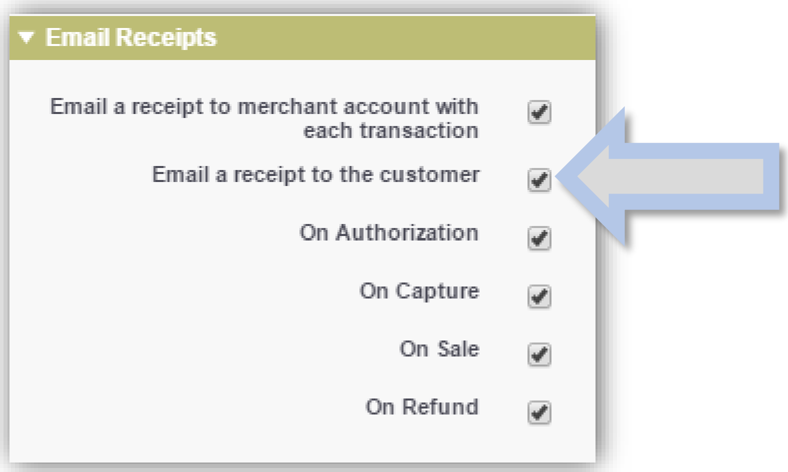
1) Navigate to the “Subscription Setup” section, either by clicking the tab by that name or clicking the “+” sign at the far right and then locating the link
2) Click “New”
3) Fill in all of the fields, making the subscription name as descriptive as possible, and click Save



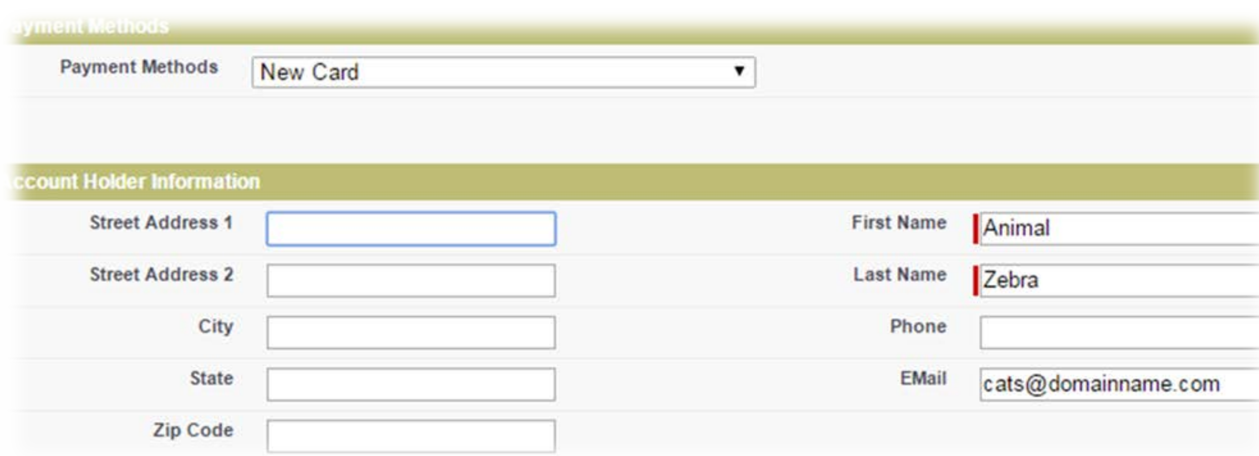
Receipt Email

Whether or not a receipt is automatically emailed depends on two factors which both must be met in order for a receipt to be emailed to the customer.

FACTOR 1: Whether or not the “Email a receipt to the customer” checkbox is checked



FACTOR 2: Whether or not the email address is entered at the time the transaction takes place



Receipt Email Customization

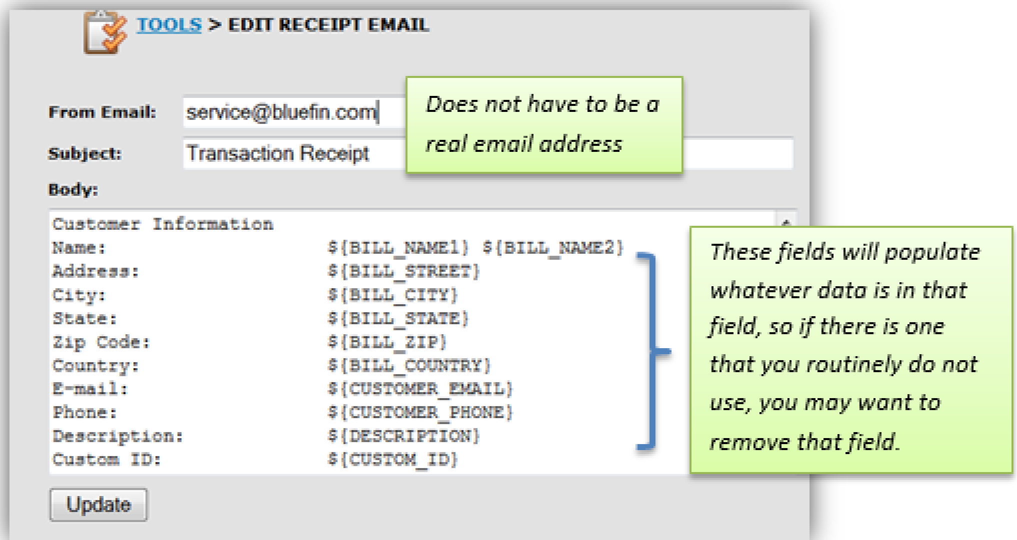
There are two ways to customize the receipt email that the customer sees:

OPTION 1: Customize within PayConex

NOTE: *For additional information about PayConex, download the PayConex manual at bluefin.com/merchant support*

1) Log into PayConex at https://secure.payconex.net

2) Go to the “tools” tab and click on “RECEIPT EMAIL”
3) Edit whatever you would like and click “Update”



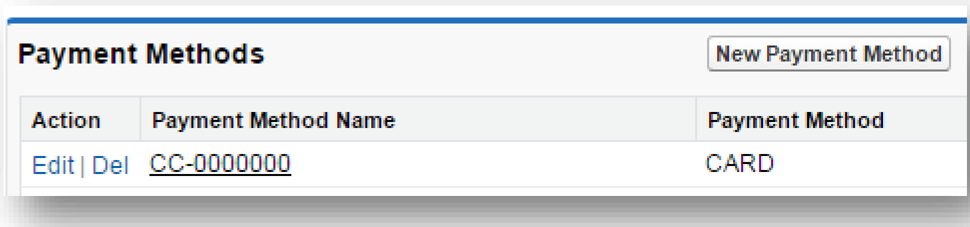
OPTION 2: Customize within Salesforce

1) Ensure customer receipt is turned off in both PayConex (log into PayConex, go to “settings” and “MANAGE SETTINGS”), and the Configuration menu in Salesforce
2) Create an email template within Salesforce for the receipt (consult your Salesforce administrator for instructions for creating a receipt email)
3) Automate the receipt email once the payment is taken using either the workflow rules or Process Builder (consult your Salesforce administrator for assistance)

✓ ***Customization ideas:***
- *Create a “send receipt” checkbox and write it into your automation setup*
- *Create multiple templates for various different types of payments and a corresponding picklist that is selected at the time of purchase; allowing you to customize the receipt for what was purchased!*

Storing and Tokenizing a Credit Card for Later Use

1) Add the “Payment Method” related list to the object on which you are taking payments; see page 24 for instructions
2) Click “New Payment Method”



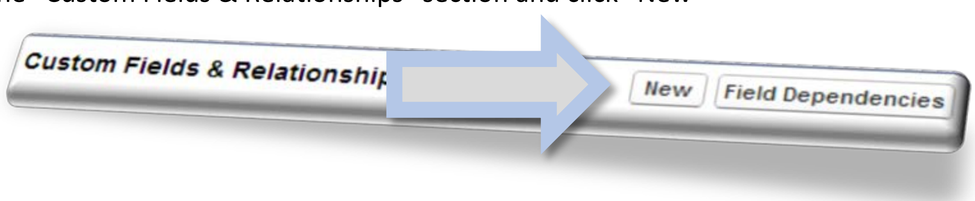
3) Swipe or key the card and press “Save”

✓ The card will be available for later use. See page 18 for instructions for running a transaction on a stored card

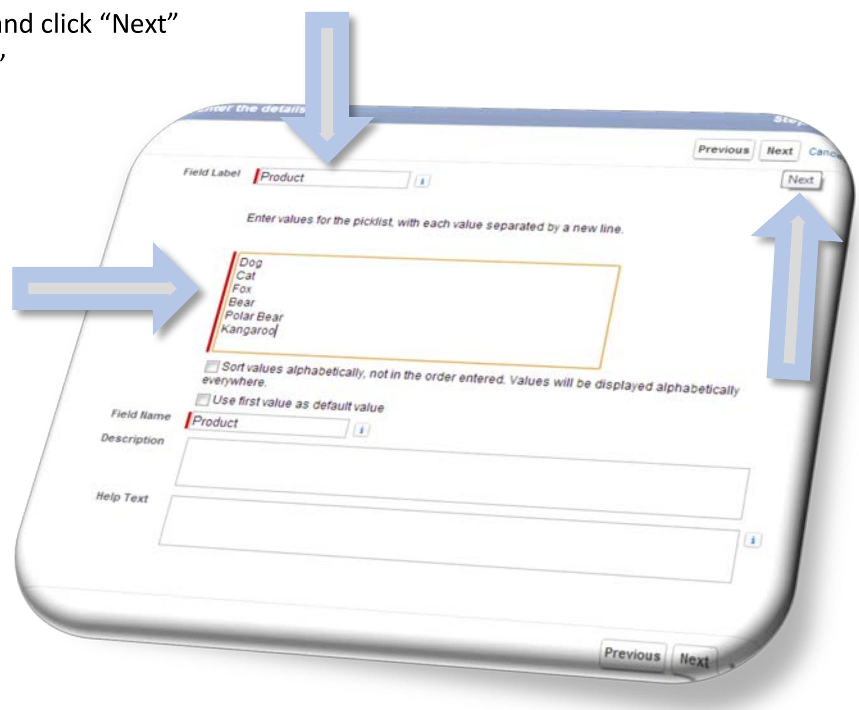
Customization

Adding Custom Fields

1) Navigate to “Setup”
2) Navigate to the custom object you want to edit and click on it; in this example “Payment” is selected
3) Scroll down to the “Custom Fields & Relationships” section and click “New”



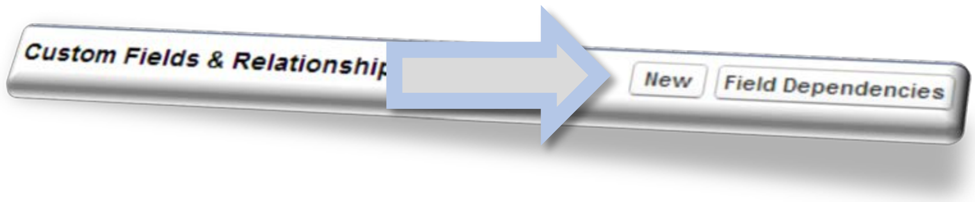
4) Select the type of field you want to create and click “Next”; in this example, we are selecting “Picklist”
5) Name the field and fill in required fields and click “Next”
6) Click through the screens and click “Save”



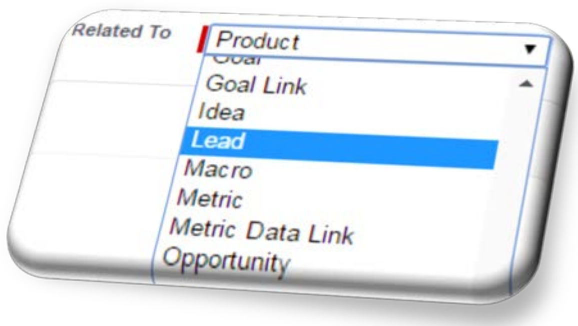
Linking Bluefin Payment Processing Features to Other Object

NOTE: *Bluefin payment features are only linked to account records "out of the box"; below are instructions for linking them to other objects*

1) Navigate to "Setup"
2) Navigate to the custom object you want to edit and click on it; in this example "Payment" is selected
3) Scroll down to the "Custom Fields & Relationships" section and click "New"



4) Select "Lookup Relationship" and click "Next"
5) Choose the object you want to take payments on and click "Next"

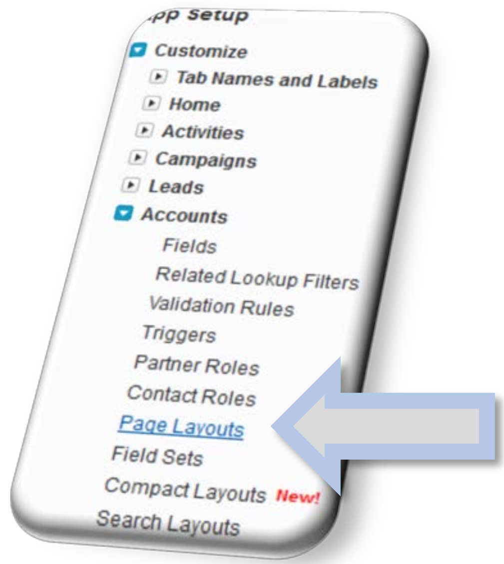


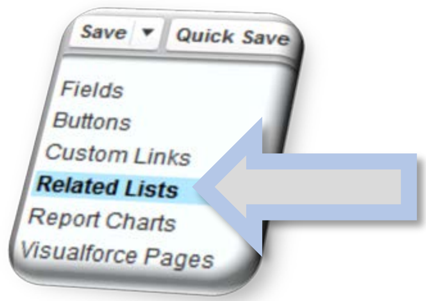
6) Press "Next" through the various steps, customizing as needed

Adding Bluefin Payment Processing Features to Other Object Page Layout

Note: *There must be a corresponding lookup field on the Bluefin object to add it to another object. "Out of the box", there is only a lookup created for the standard "account" object. For instructions for adding a corresponding lookup field, see above.*

1) Navigate to “Setup”
2) Navigate to the object you wish to edit and click “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:

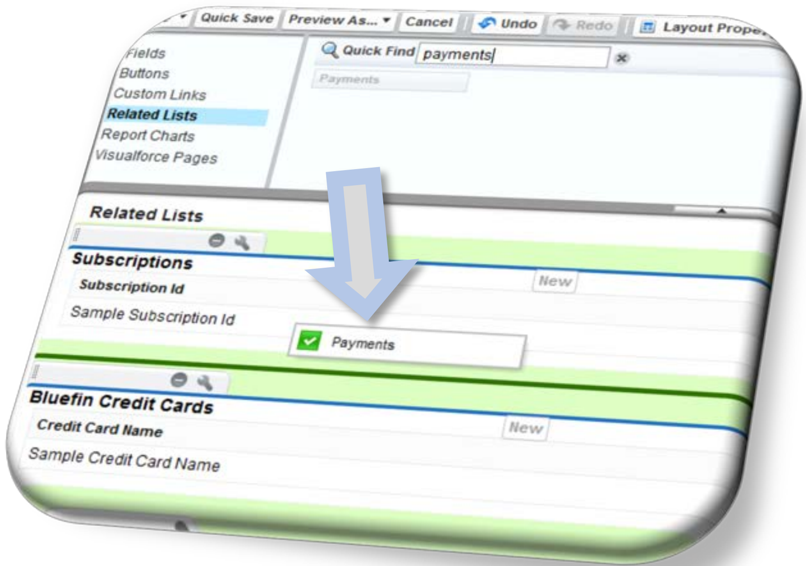




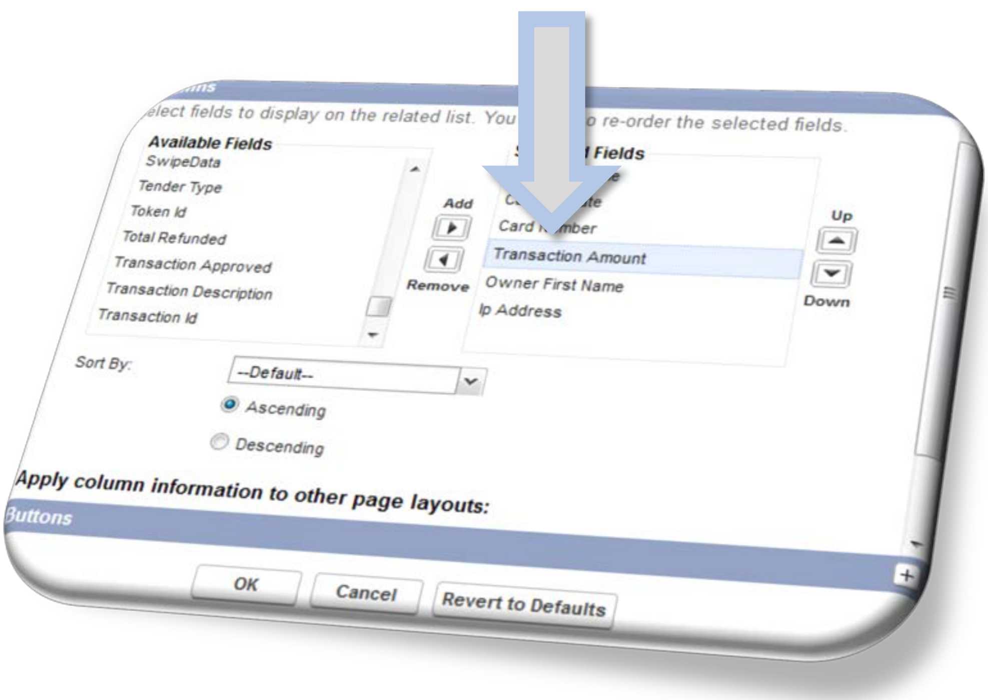
Options:

- ✓ **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
- ✓ **Payment Method** – Saves the tokenized version of a card, allowing you to reissue the transaction without re-entering the card information

6) Drag the relevant object onto the page layout



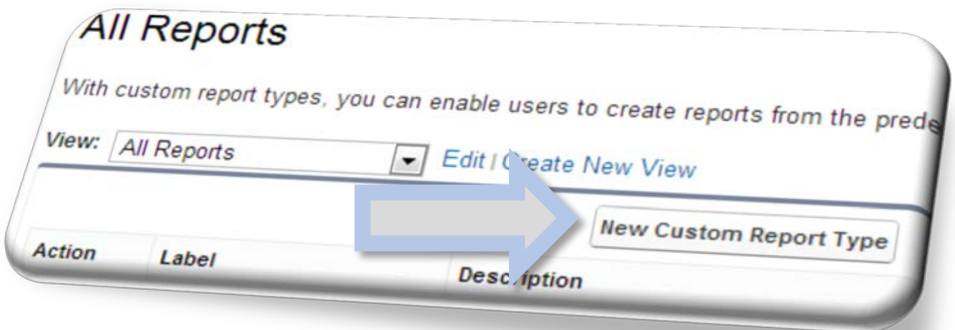
7) Click the  picture of a tool next to each related list to select which fields will be displayed on the account page



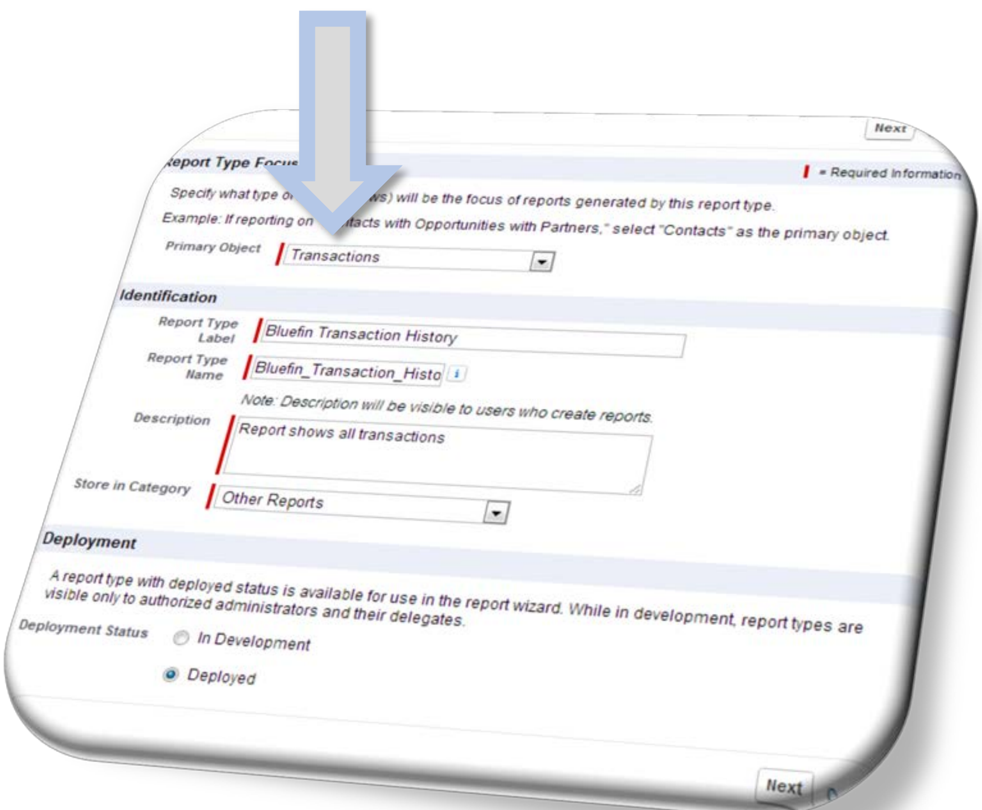
Creating a Customized Report Type

You will be able to create reports from each individual object without any additional customizations; follow these instructions if you want to pull in fields from other objects.

1) Navigate to "Setup"
2) Click "Create" and then "Report Types"
3) Click "New Custom Report Type"

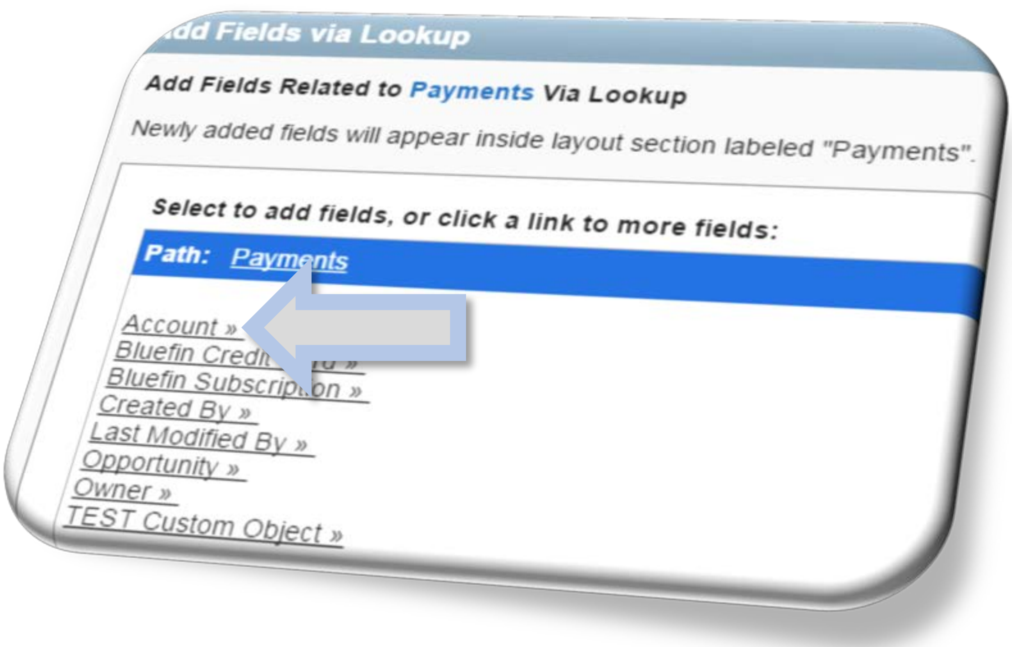


4) Select Primary Object, fill in the required fields, choose the "Deployed" checkbox, and click "Next." In this example we are choosing "Transaction History" to capture all transaction activity.

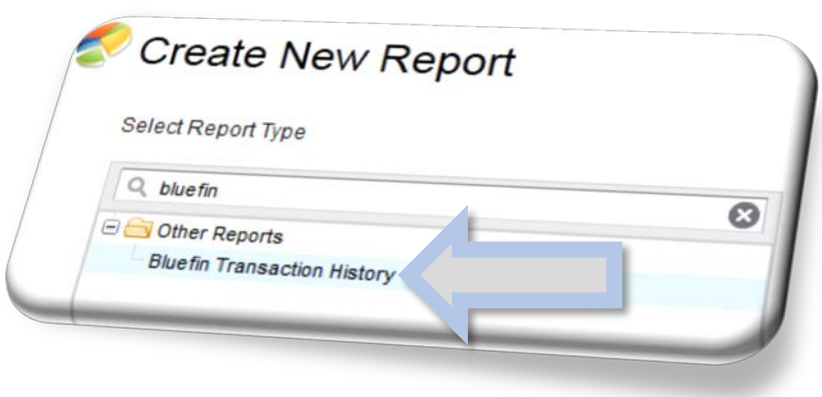


5) Click “Save”
6) Navigate back to the report and click “Edit Layout”
7) On the next screen, click “Add fields related via lookup”

8) Follow the paths to add fields from any related objects



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



EXAMPLE REPORT:

Bluefin Transaction History

Report Generation Status: Complete

Report Options:

Summarize information by: --None--

Show: All transactions

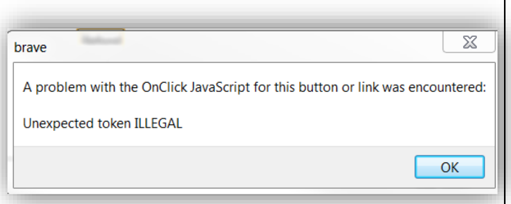
Time Frame — Date Field: Created Date; Range: Current FQ; From: 10/1/2013; To: 12/31/2013

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	-
a1DJ00000002Qxm		************1111	-
a1DJ00000002Qxr		************1111	-
000000000521	joe Tester	************1111	$9.03
000000000541	joe Tester	************1111	$5.00
000000000581	joe Tester	************1111	$13.00
000000000601	test trey	************5454	$1.05
000000000621	Mike's Test Company	************9501	$1.00
000000000641	Mike's Test Company	************9501	$1.00
000000000661	Mike's Test Company	************9501	$1.00
000000000681	joe Tester	************2349	$123.00
000000000701	joe blow	************1111	$5.00
Grand Totals (15 records)			

Troubleshooting

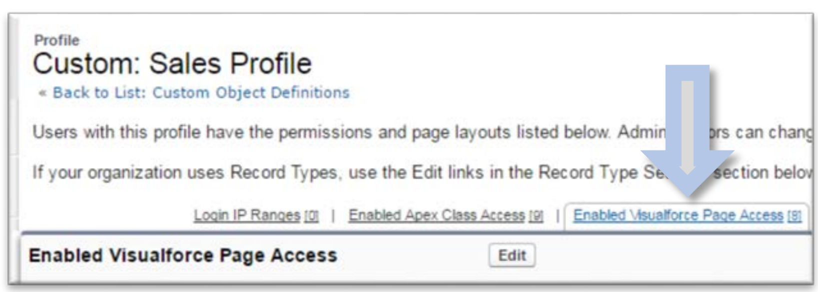
<table>
<tr><th>PROBLEM/ ERROR MESSAGE</th><th>SOLUTION/ TROUBLESHOOTING STEPS</th></tr>
<tr><td>Upon clicking a button, you get the message “A problem with the OnClick JavaScript for this button or link was encountered: Unexpected token ILLEGAL”


</td><td>Certain components of the app have the ability to be added in multiple places, but are programmed to only work in pre-programmed instances. This error message occurs when a button is added to a page layout where it doesn’t belong. Remove the button from the layout and use this guide to find the correct place to accomplish your task.</td></tr>
<tr><td>Refund banner does not show up and there is no error message in its place

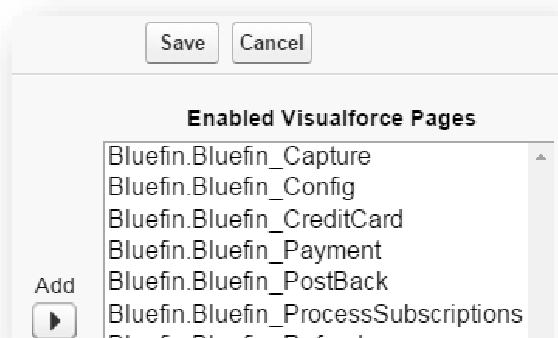

</td><td>Use a different browser – Google Chrome tends to work best. Certain browsers do not display this feature.</td></tr>
<tr><td>Refund banner does not show up and there is an error message that says “Content cannot be displayed: You do not have sufficient privileges to access the page: /apex/bluefin__Payment_Staus”

</td><td>

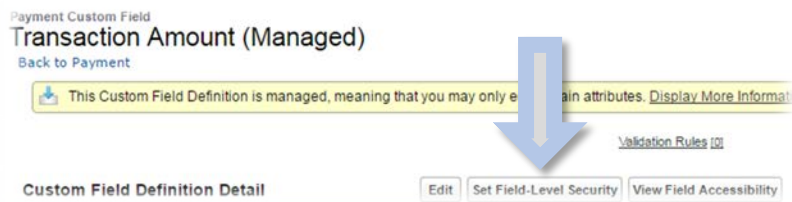
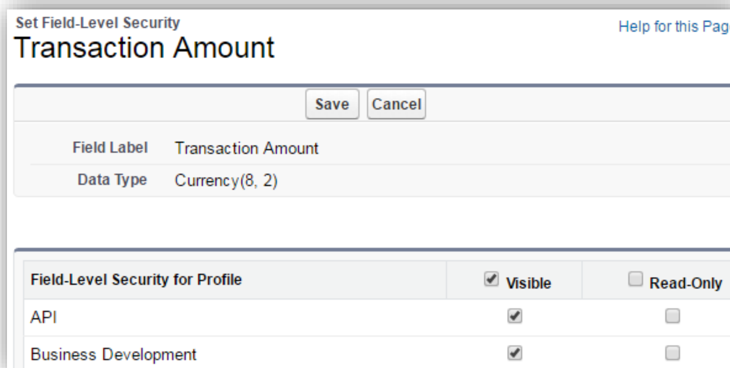
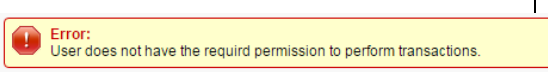
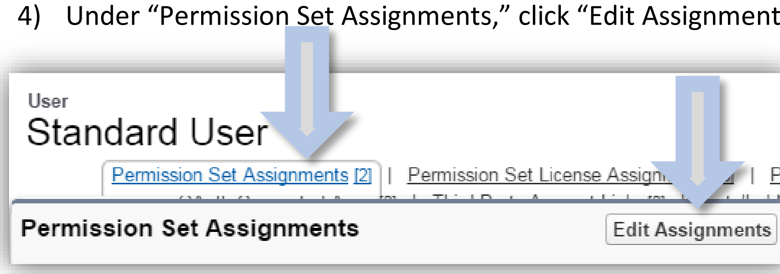
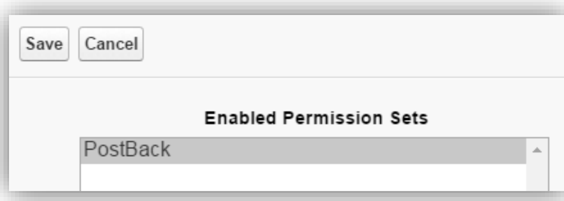
1) Navigate to Setup
2) Go to “Profiles”
3) Find profile assigned to user who received error
4) Under “Enabled Visualforce page access click “edit”



5) Add all Visualforce pages that start with “Bluefin” and click “Save”


</td></tr>
<tr><td>Certain users cannot see certain fields</td><td>

1) Navigate to setup</td></tr>
</table>

	2) Navigate to object with fields not visible 3) Navigate to field 4) Once on field page, click "Set Field-Level Security"  5) Find the profile of the user, check the "Visible" box, and click "Save" 
When trying to perform sale, user gets "Error: User does not have the required permission to perform transactions." Error message: 	1) Navigate to setup 2) Go to "Profiles" 3) Find the profile assigned to user who received error 4) Under "Permission Set Assignments," click "Edit Assignments"  5) Add "PostBack" and click "save" 
"Card Data Unreadable" 	Contact Bluefin, there is a configuration or device issue on your account
Card is keyed or swiped and does not show up on screen	1) Make sure you hit "Click to Enter Card Detail" button

	 2) Click to the left of the cancel button then key or swipe card  3) If it still does not work, try another browser
Card security code is not populating	You may not be using a compatible device, contact Bluefin
When card is swiped, "Enter Card Detail" box just blinks and card data is not populated	You may not be using a compatible device, contact Bluefin
Unable to key card, does not populate onto payment page	TROUBLESHOOTING CHECKLIST ✓ Key card number on the device itself and not the keyboard ✓ Go through all prompts on device, pressing enter after each one ✓ Click "Click to Enter Card Detail" button before entering data