# PayConex For salesforce



User Manual v 1.0

Issued on 06/7/2016

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# PayCenex



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## 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: <a href="mailto:servicemanagers@bluefin.com">servicemanagers@bluefin.com</a>

## **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

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# PayCenex



For the PayConex manual, support help and more, visit <u>www.bluefin.com/merchant-support.</u>

# **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

# PayC nex



## **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
- o 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=a0N3000000q5FXEAY

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

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

#### 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**

 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.
  - "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 <u>https://developer.salesforce.com/signup</u> and follow the on-screen instructions.

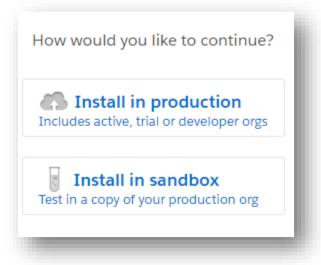
- 1) Download PayConex in the AppExchange store at https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000q5FXEAY
- 2) Click on "Get it Now"
- If you haven't done so already, login with your existing SFDC credentials or the credentials that were created in the developer account section.







4) Click on Install in Production



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

	Almost there!	
WHAT YOU ARE INSTALLING	WHERE YOU ARE INSTALLING	
PACKAGE PayConex 2.1 - Bluefin Payment Systems	ORGANIZATION Bluefin Payment Systems	
VERSION BluefinPaymentProcessor (Fall 2015 / 1.30.0)	EDITION Developer	
SUBSCRIPTION Free	USER NAME Ijulien@bluefin.com	
DURATION Does Not Expire		
NUMBER OF SUBSCRIBERS Site-wide		
🗆 I have read and a	gree to the terms and conditions .	
Cancel Install   Back to previous step	co	onfirm 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





	/Conex 2.1 - BI	uefin Paymen	t Systems
Install for Admins Only	Install for All U	Isers	or Specific Profiles
elect Specific Profiles			Instali Cancel
	om objects and components installed in the Read-Only profile) don't receive tot editable for standard profiles, yo Set access level for all profiles to	e access to any installed custom	objects.
Standard profiles (including	the Read-Only profile) don't receiv ot editable for standard profiles, yo	e access to any installed custom u must clone your profile to grant	objects. access
Standard profiles (including Because permissions are n	the Read-Only profile) don't receiv ot editable for standard profiles, yo Set access level for all profiles to Access Level	e access to any installed custom u must clone your profile to grant	objects. access
Standard profiles (including Because permissions are n Profile System Administrator	the Read-Only profile) don't receiv ot editable for standard profiles, yo Set access level for all profiles to Access Level	e access to any installed custom u must clone your profile to grant No Access	objects. access
Standard profiles (including Because permissions are n	the Read-Only profile) don't receiv of editable for standard profiles, yo Set access level for all profiles to Access Level Full Access (Your profile m	e access to any installed custom u must clone your profile to grant No Access ust have full access to the package)	objects. access
Profile System Administrator Standard Platform User	the Read-Only profile) don't receivent of editable for standard profiles, you set access level for all profiles to Access Level Full Access (Your profile minimum for the formation of the format	e access to any installed custom u must clone your profile to grant No Access ust have full access to the package)	objects. access
Standard profiles (including Because permissions are not perm	the Read-Only profile) don't received and and profiles, you set access level for all profiles to Access Level Full Access (Your profile minimum No Access No Access	e access to any installed custom u must clone your profile to grant No Access ust have full access to the package)	objects. access
Profile System Administrator Standard Platform User Authentiscaled Website Cross Org Data Proxy User	the Read-Only profile) don't receive tot editable for standard profiles, you Set access level for all profiles to Access Level Full Access (Your profile mit No Access No Access No Access	e access to any installed custom u must clone your profile to grant No Access ust have full access to the package)	objects. 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."

websites. Make sure you	r receive data from third-party trust these websites. <u>What if voc</u>
are unsure? Website	SSL Encrypted
cert.payconex.net	1
Yes, grant access to the Continue	hese third-party web sites

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

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

Security Controls	Remote Site	Edit
Health Check New!		Lait
Sharing Settings	Enter the LIDL for the r	emote site. All s-controls, JavaScript OnClick comma
Field Accessibility		ehote site. All s-controls, savascript offelick contra-
Password Policies		
Session Settings		
Login Flows	Remote Site Edit	Save Save & New Cancel
Network Access		
Activations	Remote Site Name	PayConex
Session Management	Demete Site UDI	
Login Access Policies	Remote Site URL	https://secure.payconex.net
Certificate and Key Management	Disable Protocol	i i
Single Sign-On Settings	Security	
Auth. Providers	Description	
Identity Provider		
View Setup Audit Trail		
Account Owner Report		
Expire All Passwords	Active	
Delegated Administration		
Remote Site Settings		
Named Credentials		Save Save & New Cancel
File Upload and Download Security		
CORS		
Portal Health Check		





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."

Accounts	Configuration	Payments	Refunds	Subscription Setup	Subscriptions	Help
Bluef	in Configuration	ı				
▼ Hel	p and Registration					
Welc	ome to the Bluefin F	ayment Proces	sing Applica	tion.		
To us	e this application, y	ou must registe	r for a Merch	ant Processing Account		
Plea	se contact Bluefin at	800-675-6573	to get started	li i		
<u>Visit</u>	Bluefin.com					
▼ Gat	teway Configuration	n				
Blue	fin will provide a UR	L"s for you to u	se. Be sure to	o add the base URLs to yo	ur Remote Site Set	tings.
Upda	ate Remote Site Sett	ings				
		Gateway UR	L https:/	/secure.payconex.net/a		
Blue	fin will also provide a	a an AccountID	and API Key	for you to use here.		
		Account	Id 12069	99999999		
		API Access ke	ey ******	*******		
Chec	k this box if your Blu	lefin account is	configured for	or ACH transactions.		
		Enable AC	H			



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

i Installation	Complete!			
				Done
App Name	Publisher	Version Name	Version Number	
PayConex 2.1 - Bluefin Payment Systems		Spring 2015	1.18	
Description				
	integrated card present and card encryption (P2PE) solution in Nort		d by state of the art security - in	cluding the

#### If you upgraded your existing app:

Syst	grade PayConex ems lefin Payment Systems	2.1 - Didein	rayment
<b>i</b> Upgrade (	Complete!		
			Done
App Name	Publisher	Version Name	Version Number
<b>App Name</b> PayConex 2.1 - Bluefin Payment Systems	Publisher Bluefin Payment Systems	Version Name Fall 2015	Version Number 1.30
PayConex 2.1 - Bluefin			



# **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"

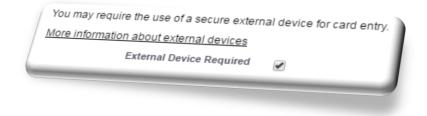
Transaction Type SALE - Transaction Amount 10000000	Merchant Transaction Id
Transaction Description "Services"	Custom Data
Card Profiles New Card	
First Name Lisa Last Name Money	Street Address 1
Phone 911 EMail	Street Address 2 City
ard Information	State Zip Code 60660
Card Number 5151515151515151	
Expiration Month February Expiration Year 2016	Save Card Profile
Process Cancel	





# **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"

	Click to Enter Card Detail
Card Number	
Expiration Month	-None-
Expiration Year	-None
Security Code	

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

Account Holder	Information	
Save Profile		
First Name	LISA	
Last Name	CARDHOLDER	
Phone		
EMail		
Lindii		
Card Informatio	on ick to Enter Card Detail	
Card Informatio		
Card Informatio	ck to Enter Card Detail	▼]
Card Informatio Cli Card Number Expiration	tek to Enter Card Detail	¥.
Card Information Cli Card Number Expiration Month	tek to Enter Card Detail *******6012 August	·

5) Enter additional information as needed



## **Reissuing a Payment**

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

#### **OPTION 1:**

PayConex for AppExchange Manual v1.0

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- 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

Payment Methods	New Card
	New Card
	MASTERCARD: *******5454 February 2019
	MASTERCARD: *******5454 January 2017
ccount Holder Information	MASTERCARD: *******5454 January 2019
Street Address 1	MASTERCARD: ******5454 February 2019

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

Card Number	*********5454
Expiration Month	January
Expiration Year	2018
C	***

#### **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

Payment Methods	New Payment Method	nt Methods [1]   Subscriptic	ons [0]   Contacts [0]   Opp	ortunities [0]   <u>Cases</u> [0]
Action Payment Method Name Edit   Del <u>CC-0000002</u>	Payment Method			Payment Methods Help
	CARD	Card Brand MASTERCARD	Card Number	Created Date
		MASTERCARD	******5454	4/12/2016

- 2) Scroll down to "Payments" section
- 3) Click "New Payment"

<b>nex</b>	K		salesforce a
🔄 Payn	nents	New Pa	ayment
Action	Payment Name	Bluefin Subscription	Card Number
Edit   Del	PMT-0000006		
	PM1-0000006		

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

Card Numb	ber ********5454
Expiration Mont	h January
Expiration Year	
Security Code	

## **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"

V Status			
		Approved Refund	
Payment Name	PMT-0000006	Owner	Lisa Julien [Change]
Account	Test 2	Created By	Lisa Julien, 4/12/2016 7:08 AM
Bluefin Subscription		Last Modified By	Lisa Julien, 5/9/2016 7:33 AM
Bluefin Credit Card	CC-000002	Ip Address	50.249.216.141
Transaction Approved	1	Refund Date	

3) On the next screen, click "Refund" again



Bluefin Refund	d
Refund Detail	
Account	Bluefin Test
Card Number	*******5454
Amount To Refund	\$10.00
Comment	Return
	Refund Cancel

Here is what a refunded payment looks like.

Status		Banner	shows as
	Refu	nded refunded	d
Payment Name	PMT-0000001	Owner	Bluefin Appreciates Your Business! [Change]
Account	Bluefin Test	Created By	Bluefin Appreciates Your Business!, 4/8/2016 11:33 AM
Bluefin Subscription		Last Modified By	Bluefin Appreciates Your Business!, 5/9/2016 7:31 AM
Bluefin Credit Card		Ip Address	50.249.216.141
Transaction Approved	Pofund data is displayed	Refund Date	4/8/2016 11:33 AM
Transaction Type	✓ Refund date is displayed	Capture Date	
Opportunity			
General Information			
First Name	Lisa	Payment Method	CARD
Last Name	Test	Card Brand	VISA
Street Address 1		Card Number	***********8616
Street Address 2		Expiration Month	June
City		Expiration Year	2018
State			
Country			
Zip		Transaction Amount	\$10.00
Email	Refund amount is displayed	Auth Amount	
Phone	L	Total Refunded	\$10.00
Detail			
Transaction Id	00000001241	Custom Id	
Transaction Description	Refund record show		
🛛 Refunds	payment page as re	elated list	Refunds Help 🕐
Action Refund Id	Account Bluefin Subscription	Amount	Cancel Subscription Comment
Edit   Del REF-0000001	Bluefin Test	\$10.00	



## **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**

- 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"

Select Account	
	Account Mike's Tes pany 😒
elect Subscription	
Subscript	tions \$10/ Month Premium Service: Monthly
Today's Amo	10.00
Recurring Amoun	
Next Payment Date	[10/21/2013]
Options	
Card Profiles	MASTERCARD: *********9501 February 2016



#### **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

In	scription Setup Ed	dit Save	Save & New Cancel		
	Subscription Name Subscription Type Description Active	S10/ Month Premium St Monthly \$10 a month premium service, inclu unlimited services for the entire mod	udes nth	Ow	ner
Initial	nitial Amount 🛛 🖉 Term (Days) ial Amount 10.00			Payment Attempts Retry Interval (Days)	

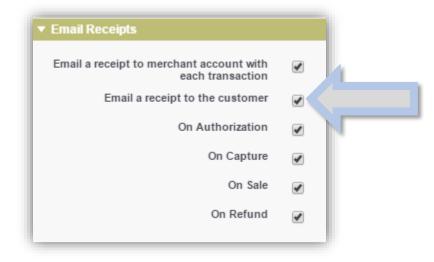




# **Receipt Email**

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

Payment Methods	New Card	▼	
count Holder Informatio	n		
Street Address 1		First Name	Animal
Street Address 2		Last Name	Zebra
City		Phone	
State		EMail	cats@domainname.com
Zip Code			

#### **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 <u>bluefin.com/merchant support</u>

1) Log into PayConex at <a href="https://secure.payconex.net">https://secure.payconex.net</a>



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

From Email:	service@bluefin.com	Does not have to be a	
Subject:	Transaction Receipt	real email address	
Body:			
Customer In	formation		
Name:	\$(BILL	NAME1) \${BILL NAME2}	These fields will populate
Address:	\$ (BILL	STREET }	
City:	\${BILL	CITY}	whatever data is in that
State:	\${BILL	STATE)	field, so if there is one
Zip Code:	\${BILL	ZIP)	field, so if there is one
Country:	\${BILL	COUNTRY }	that you routinely do not
E-mail:	\${CUSTO	MER_EMAIL}	the second se
Phone:	\$ (CUSTO	MER_PHONE)	use, you may want to
Description	S DESCR	IPTION}	remove that field.
Custom ID:	\$ (CUSTO	M ID}	remove marghera.

#### **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"





Payment Methods		New Payment Method	
Action	Payment Method Name	Payment Method	
Edit   Del	<u>CC-0000000</u>	CARD	

- 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"

Custom Fields & Relationship	
	New Field Dependencies

- 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"

	enter the detail			Stop
	Field Label Produ		th value separated by a new line	Previous Hext cand
	Dog Cat Fox Bear Polar Bear Kangarool			
Field Nan Descriptio	ne Product	as default value	der entered. Values will be disp	layed alphabetically
Help Text				



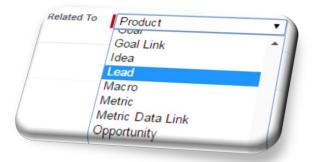
# Linking Bluefin Payment Processing Features to Other Object

**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"

Custom Fields & Relationship	
	New Field Dependencies

- 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

Fields	Quick Find payments	*	
Buttons	Payments		
Custom Links			
Related Lists			
Report Charts			
Visualforce Pages			
Related Lists			
1 12			
Subconintio			_
Subscriptions		ew	
Subscription Id		ew	
Sample Subscription Id			
	Payments		-
04			
luefin Credit Cards			
Credit Card Name	New		
ample Credit Card Name			
			1

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

Available Fields       ore-order the select         Available Fields       Add         Tender Type       Add         Total Refunded       Transaction Approved         Transaction Description       Transaction Amount         Transaction Id       Owner First Name         Sort By:       —Defaut	Up I Down
OK Cancel Revert to Defaults	



App Setup

Customize

# **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.

Aeport Type Focus	Next
	= Required Inform
Specify what type on (NS) will be the focus of reports	generated by this report type.
Example: If reporting on Aacts with Opportunities with Parts Primary Object Transactions	ners," select "Contacts" as the primary object.
Identification	
Report Type Bluefin Transaction History	1
Basad T.	
Name Bluefin_Transaction_Histo	
Note: Description will be visible to users who cre	ate reports
Report shows all transactions	
Store in Category Other Day	
Other Reports	
eployment	
a report type with deployed status is available for use in the report wizard. V sible only to authorized administrators and their delegates.	
sible only to authorized administrators and their delegates.	While in development, report types are
yment Status O In Development	pertopes are
Deployed	
~ - opiojeu	





- 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

Add Fields Related to Payments Via Lookup         Newly added fields will appear inside layout section labeled "Payments".         Select to add fields, or click a link to more fields:         Path:       Payments         Account »         Bluefin Credit       100 m/2         Bluefin Subscription »         Created By »
Path:       Payments         Account »       Bluefin Credh         Bluefin Subscription »       Created By »
Last Modified By » <u>Opportunity »</u> <u>Owner »</u> <u>TEST Custom Object »</u>

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

Create New Report	
Select Report Type	
Q bluefin	8
	0
Bluefin Transaction History	
	Select Report Type



salesforce appexchange

#### **EXAMPLE REPORT:**

Sum.	marize information by:	Show	Date Field	Range
	- ·	All transactions 👻	Created Date 🗸	Current FQ From To 10/1/2013 12/31/201
Run Repo			ble View Export Details	]
Bluefin Tr. 0000000004	Account: Account			ount
000000004		*******		5.00
0000000048	1 ELAVON CERTIFICA	**************************************	*1111 \$1:	3.00
000000000501	Mike's Test Company	************	\$123	3.00
a1DJ0000002C	<u>Dxm</u>	*************************	1501	-
<u>a1DJ0000002Qx</u> <u>000000000521</u>		*************	117	-
000000000541	joe Tester	******************111	11	-
000000000581	joe Tester	**************111	\$9.0	3
000000000601	joe Tester	***************1111	\$5.00	)
000000000621	test trey	*********5454	\$13.00	l.
000000000641	Mike's Test Company	*************9501	\$1.05	
0000000000	Mike's Test Company	*************9501	\$1.00	
000000604	Mike's Test Company	************9501	\$1.00	
000000701	<u>oe Tester</u>	***************2349	\$1.00	
	e blow	********************1111	\$123.00	
d Totals (15 reco	ords)	1111	\$5.00	





# Troubleshooting

PROBLEM/ ERROR MESSAGE	SOLUTION/ TROUBLESHOOTING STEPS
Upon clicking a button, you get the message "A problem with the OnClick JavaScript for this button or link was encountered: Unexpected token ILLEGAL"	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.
Refund banner does not show up and there is no error message in its place	Use a different browser – Google Chrome tends to work best. Certain browsers do not display this feature.
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"	<ul> <li>1) Navigate to Setup</li> <li>2) Go to "Profiles"</li> <li>3) Find profile assigned to user who received error</li> <li>4) Under "Enabled Visualforce page access click "edit"</li> <li>Profile</li> <li>Custom: Sales Profile <ul> <li>Back to List: Custom Object Definitions</li> <li>Users with this profile have the permissions and page layouts listed below. Admin <ul> <li>If your organization uses Record Types, use the Edit links in the Record Type Se.</li> <li>Logn IP Rances (I) Enabled Apex Class Access (I) Enabled Visualforce Page Access</li> </ul> </li> <li>5) Add all Visualforce pages that start with "Bluefin" and click <ul> <li>"Save"</li> </ul> </li> <li>5) Add all Visualforce pages that start with "Bluefin" and click <ul> <li>"Save"</li> </ul> </li> </ul></li></ul>
Certain users cannot see certain fields	1) Navigate to setup
PayConex for AppExchange Manual v1.0	June 2016





	<ol><li>Navigate to object with fields not vis</li></ol>	ible
	3) Navigate to field	
	4) Once on field page, click "Set Field-L	evel Security"
	Payment Custom Field Transaction Amount (Managed)	_
	Back to Payment	
	This Custom Field Definition is managed, meaning that you may only e	ain attributes. <u>Display More Information</u>
		Validation Rules [0]
	Custom Field Definition Detail Edit Set Field	-Level Security View Field Accessibility
	5) Find the profile of the user, check th	e "Visible" box, and click
	"Save"	
	Set Field-Level Security	Help for this Page
	Transaction Amount	Help for this Page
	Save	
	Field Label Transaction Amount	
	Data Type Currency(8, 2)	
	Field and South to Defin	
	Field-Level Security for Profile	Visible Read-Only
	Business Development	
When trying to perform sale, user gets "Error: User does not have the required permission to perform transactions." Error message:	<ol> <li>Navigate to setup</li> <li>Go to "Profiles"</li> <li>Find the profile assigned to user who</li> <li>Under "Permission Set Assignments,</li> <li>User</li> <li>Standard User</li> <li>Permission Set Assignments [2]   Permission</li> <li>Permission Set Assignments</li> <li>Add "PostBack" and click "save"</li> </ol> Save Cancel          Enabled Permission Sets         PostBack	
"Card Data Unreadable"	Contact Bluefin, there is a configuration or d	evice issue on your account
Error:		
CARD DATA UNREADABLE		
Card is keyed or swiped and does not show	1) Make sure you hit "Click to Enter Car	d Detail" button
up on screen		

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	<ul><li>Click to Enter Card Detail</li><li>2) Click to the left of the cancel button then key or swipe card</li></ul>	
	Enter Card Detail	
	Swipe or enter card detail using external security device Cancel 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	TROUBLESHOOTING CHECKLIST	
payment page	<ul> <li>Key card number on the device itself and not the keyboard</li> </ul>	
	<ul> <li>✓ Go through all prompts on device, pressing enter after each one</li> <li>✓ Click "Click to Enter Card Detail" button before entering data</li> </ul>	