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: 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

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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.

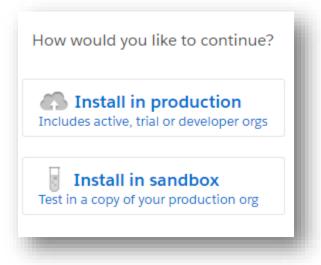
- 1) Download PayConex in the AppExchange store at https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000q5FXEAY
- 2) Click on "Get it Now"
- If you haven't done so already, login with your existing SFDC credentials or the credentials that were created in the developer account section.







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 |
|--|--|---------------------------|------------------------|
| i Upgrade (| Complete! | | |
| | | | Done |
| App Name | Publisher | Version Name | Version Number |
| App Name 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"

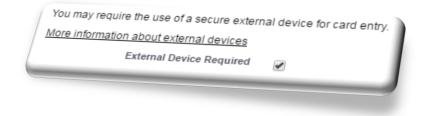
| Transaction Type SALE - Transaction Amount 10000000 | Merchant Transaction Id |
|--|--------------------------|
| Transaction Description "Services" | Custom Data |
| Card Profiles New Card | |
| First Name Lisa Last Name Money | Street Address 1 |
| Phone 911 EMail | Street Address 2 City |
| ard 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:

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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"

| nex | 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) | |

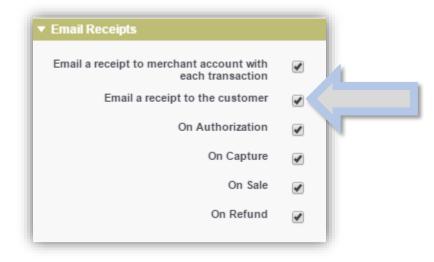




Receipt Email

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 https://secure.payconex.net



- 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 | | | | |
| | | | | |



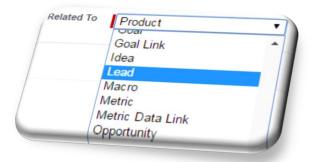
Linking Bluefin Payment Processing Features to Other Object

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" | 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" Profile Custom: Sales Profile Back to List: Custom Object Definitions Users with this profile have the permissions and page layouts listed below. Admin If your organization uses Record Types, use the Edit links in the Record Type Se. Logn IP Rances (I) Enabled Apex Class Access (I) Enabled Visualforce Page Access 5) Add all Visualforce pages that start with "Bluefin" and click "Save" 5) Add all Visualforce pages that start with "Bluefin" and click "Save" |
| Certain users cannot see certain fields | 1) Navigate to setup |
| PayConex for AppExchange Manual v1.0 | June 2016 |





| | Navigate to object with fields not vis | 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: | Navigate to setup Go to "Profiles" Find the profile assigned to user who Under "Permission Set Assignments, User Standard User Permission Set Assignments [2] Permission Permission Set Assignments Add "PostBack" and click "save" 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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| | Click to Enter Card Detail2) Click to the left of the cancel button then key or swipe card | |
|---|---|--|
| | 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 | 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 | |