

PaymentConnect™

for **A**ppexchange



Version 3.2 Users Guide

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PaymentConnect Overview

Linvio PaymentConnect allows Salesforce users to manage web-based payments through PayPal, Google Checkout, and/or Authorize.Net from inside a Salesforce.com account. PaymentConnect integrates with your payment gateway eliminating the need for double entry of payment information and supporting transactional features such as authorizing, charging, and refunding transactions inside Salesforce.

This user guide provides instruction for common uses of PaymentConnect within Salesforce.

Setup and configuration information can be found in the PaymentConnect Configuration guide, and developer/customization information in the PaymentConnect Developers guide. Both of these documents are available at www.linvio.com.

First, let's look at how PaymentConnect works (at a very high level).

Outbound Transaction Requests

Outbound transactions, such as Payment Terminal credit card charges, or requests to void or refund previously completed transactions, are sent directly to your payment processor from Salesforce via web service calls.

PaymentConnect will wait a few seconds for a response and then post the transaction results to a Payment record in Salesforce.

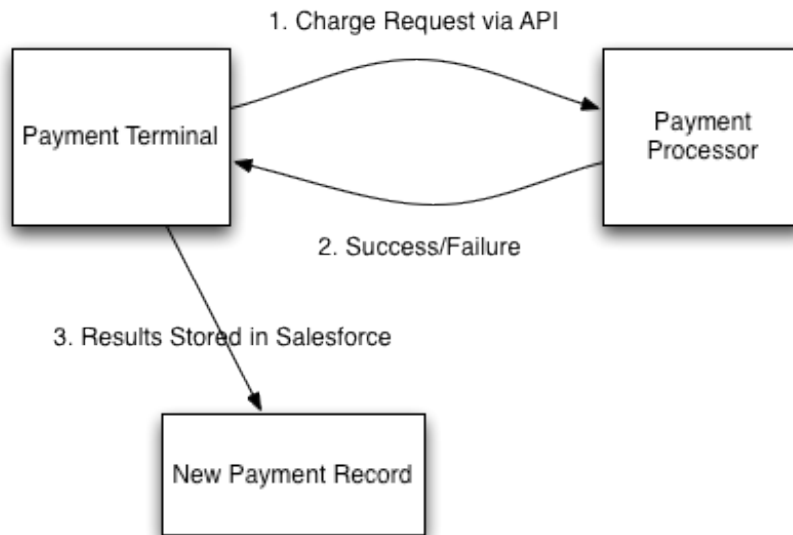


Figure 1. PaymentConnect supports direct integration between Salesforce and your payment processor for outbound transactions.

Several payment terminals (Visualforce pages) are included with PaymentConnect and support creation of recurring payment profiles, handling online quote authorizations, processing credit cards and building ecommerce Sites applications in Salesforce.

Inbound Transaction Notification Handling

Inbound transactions notifications, such as customer disputes, recurring payment notifications, or new payment notifications originating from your payment processor or your website, can occur at any time (asynchronously), so PaymentConnect provides relay scripts that “listen” for messages from the payment processor and passes them along to PaymentConnect for handling. When PaymentConnect is configured, one relay script is set up for each payment processor you connect to Salesforce.

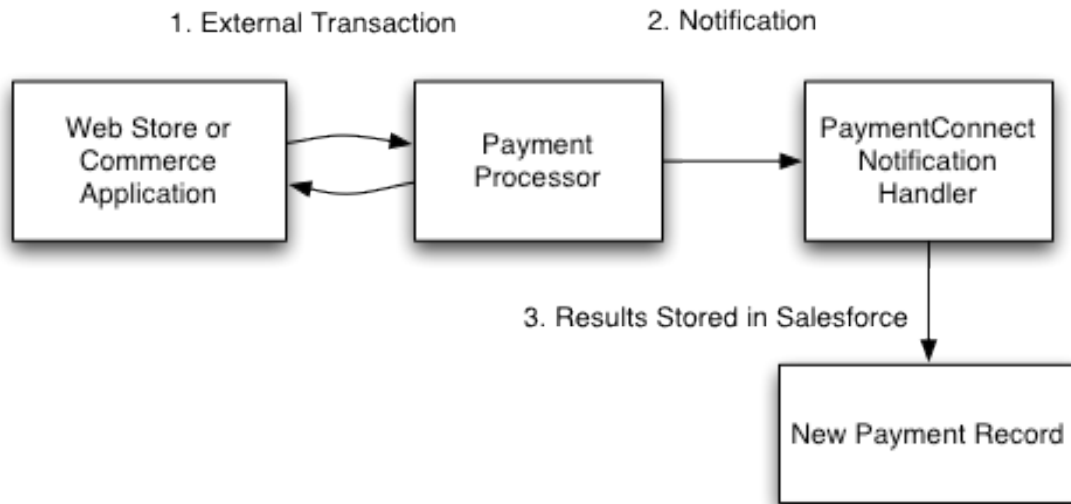


Figure 2. Inbound (asynchronous) notifications are handled with relay scripts or "listeners".

PaymentConnect provides a number of options for handling new transaction notifications and can be configured to create new contact records, as well as automatically populate lookup relationships between the new Payment record and its related Opportunity, Contact, Shopping Cart, and Product records.

PaymentConnect Tabs and Objects

Once installed, you will notice the PaymentConnect application is now available in the drop down menu and several new tabs have been added.



Payments

New Payment records, whether created from inside Salesforce, or created as the result of an inbound transaction notification, will appear under the Payments tab. Payment records can be associated with Accounts, Opportunities and Contacts, so you may see related Payments lists on the page layouts for these objects as well. Usually, users will create new Payments using a payment terminal, or PaymentConnect will auto-create Payments when a new payment notification is received from your payment processor. However, for cash, check, and other types of payments not processed through your payment processor, you may create new Payment records by clicking the “New” button and filling in payment details manually or by bulk loading transactions with the Salesforce Data Loader.

Payment Profiles

PaymentConnect uses the Payment Profile object to track recurring payment profile details, to manage recurring payments, and if you have installed the Secure Terminal add-on for PaymentConnect, to store encrypted credit card details for each contact. Payment Profile records will ordinarily be created as the output from a payment terminal transaction, or when PaymentConnect handles a new recurring payment profile notification from your payment processor.

PaymentConnect Settings

The PaymentConnect Settings tab opens the object that stores payment processor account information and settings that control PaymentTerminal features and handling of inbound transactions. This tab may not be available to you if your Salesforce administrator has elected to hide this object type from your user profile.

Shopping Cart Items

PaymentConnect also provides a Shopping Cart Item object, which is used to break Payments into individual product line items. When your payment processor sends a “new payment” notification PaymentConnect will look for shopping cart line items in the notification and create matching Shopping Cart Item records and attach them to the new Payment record (and if possible, to matching Salesforce Products).

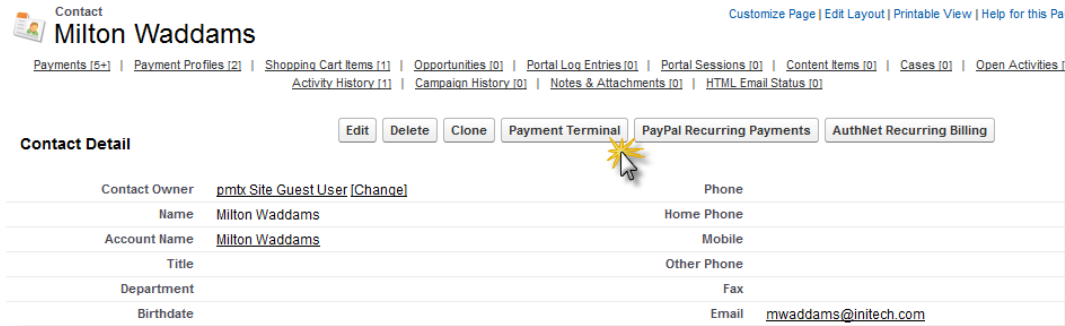
Add-on applications (such as shopping cart solutions) may use the Shopping Cart Item object to store customer cart contents prior to a purchase and later attach them to a Payment record when the customer completes the purchase. In this case, you may see Shopping Cart Items attached to a Contact record but not connected to a Payment.

Payment Terminal

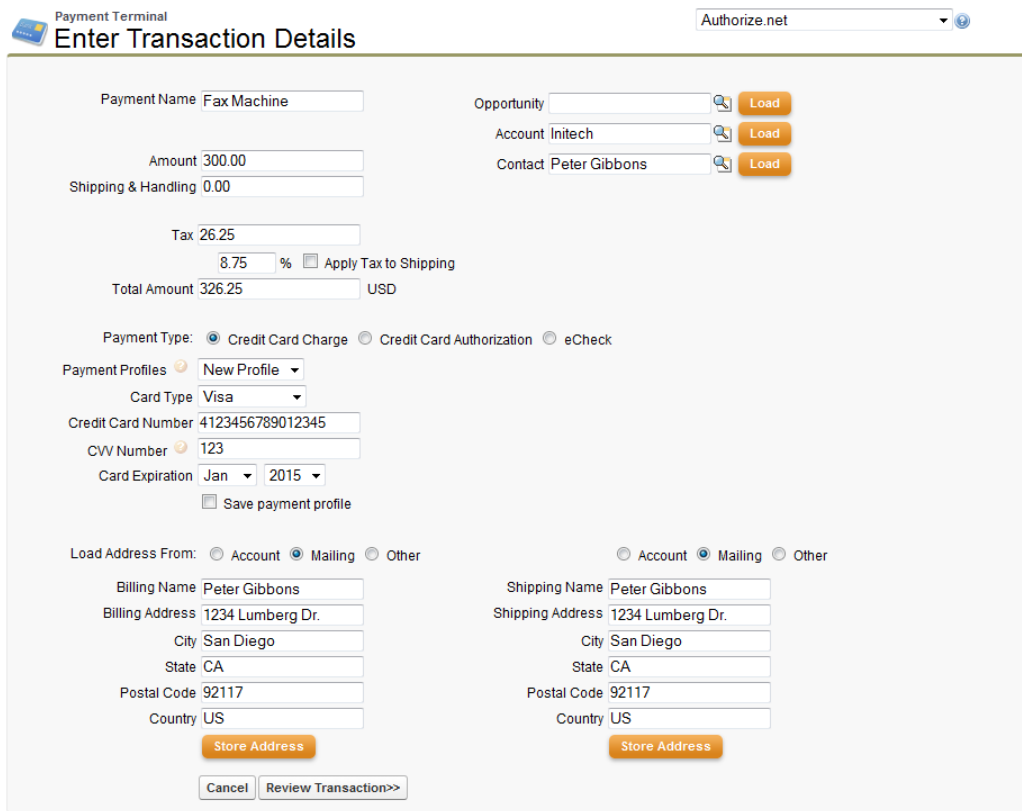
The Payment Terminal is a native Visualforce page used to submit credit card and eCheck transactions to PayPal or Authorize.net and create Payment records recording the results of the transactions. Custom buttons have been included with PaymentConnect that open the terminal from Opportunity, Account or Contact detail pages, however it is also possible to create custom buttons that invoke the

Payment Terminal from other objects (and Visualforce pages), integrating the terminal with your own custom workflow and applications.

The Payment Terminal buttons provided with PaymentConnect open the Payment Terminal visualforce page, and pass field values from the source page to fields on the terminal using URL parameters supported by the Payment Terminal. To open the Payment Terminal from a Contact record, click the Payment Terminal button provided with PaymentConnect:



The Contact record Id will be passed to the terminal where address information from the Contact is loaded into the terminal.



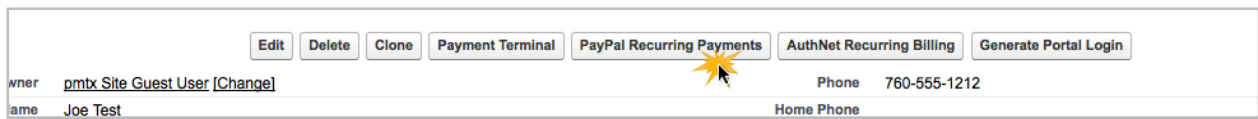
The terminal displays radio buttons above the billing and shipping address fields that can be used to pull stored values from the standard address fields on the loaded Contact and Account records. To load a new Contact, Account or Opportunity select the new record using the field's magnifying glass button and click "Load".

The "Store Address" buttons under the billing address and shipping address fields can be used to write address changes back to the Contact or Account address fields prior to running the credit card charge, or these address values can be sent straight to the payment processor without storing them.

PayPal Recurring Billing Terminal

The PayPal Recurring Payment Terminal is a native Visualforce page used to submit recurring payment profile requests to PayPal and create a corresponding Payment Profile record in Salesforce. Custom buttons have been included with PaymentConnect that open the terminal from Opportunity or Contact detail pages, however it is also possible to create custom buttons that invoke the Payment Terminal from other objects (and Visualforce pages), integrating the terminal with your own custom workflow and applications.

The "PayPal Recurring Payments" buttons provided with PaymentConnect open the Payment Terminal Visualforce page, and pass field values from the source page to fields on the terminal using URL parameters supported by the recurring billing terminal. To open the Payment Terminal from a Contact record, click the Payment Terminal button provided with PaymentConnect:



On the PayPal Recurring Payment Terminal, you will see options for specifying an initial charge amount, trial period terms, regular recurring billing terms, and contact charge information.

PayPal ARB Terminal Processor Connection: PayPal Sandbox (demo@linvio)

Set up a recurring payments profile

Subscription Name: Magazing Subscription
 Description: Tech Weekly
 Subscription Start Date: 4/3/2010 [4/3/2010]
 Profile Reference:

Opportunity:
 Account: Acme
 Contact: Joe Test

Initial One-Time Amount:
 Trial Amount:
 Make Trial Payments Every: Day(s)
 Trial Occurrences:
 Recurring Amount: 45.00 USD
 Schedule Payments Every: 1 Year
 Total Occurrences:

Card Type: Visa
 Card Number: 4111111111111111
 Card Expiration: Jan 2013
 Card Code: 123

Load Address From: Account Mailing Other
 Billing Address: 123 Oak
 City: Encinitas
 State: CA
 Postal Code: 92024
 Country: US

Account Mailing Other
 Shipping Address: 123 Oak
 City: Encinitas
 State: CA
 Postal Code: 92024
 Country: US

The page provides lookup fields for Opportunity, Account and Contact, allowing users to establish relationships between the new payment profile and each of these objects, as well as radio buttons controlling the source of the address information to be used in processing the request.

When you submit this form, PaymentConnect will send a request to PayPal to create a new recurring payment profile and start charging the customer's card against it. If PayPal approves the request a new Payment Profile record will be created in Salesforce with status set to "Active".

As PayPal processes each charge for the recurring billing profile, it will send a transaction notification to the PaymentConnect relay script configured for the processor, which will in turn create a new Payment record in Salesforce and attach it as a child of the Payment Profile.

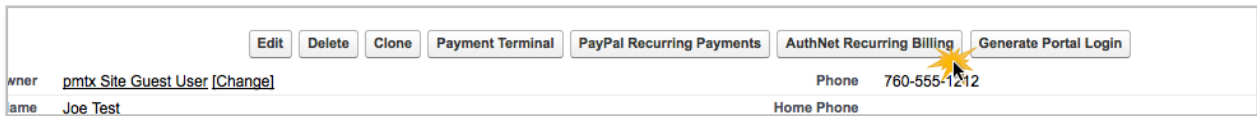
When each Payment record is created, the values in the Payment Profile Opportunity, Account, Contact and On Payment Completed fields will also be inserted with the new Payment record.

See the PaymentConnect Developer Guide for details on integrating this terminal with custom workflow and passing parameters to the page.

Authorize.Net Recurring Billing Terminal

The AuthNet Recurring Billing Terminal is a native Visualforce page used to submit recurring billing profile requests to PayPal and create a corresponding Payment Profile record in Salesforce. Custom buttons have been included with PaymentConnect that open the terminal from Opportunity or Contact detail pages, however it is also possible to create custom buttons that invoke the Payment Terminal from other objects (and Visualforce pages), integrating the terminal with your own custom workflow and applications.

The "AuthNet Recurring Billing" buttons provided with PaymentConnect open the Payment Terminal Visualforce page, and pass field values from the source page to fields on the terminal using URL parameters supported by the recurring billing terminal. To open the Payment Terminal from a Contact record, click the Payment Terminal button provided with PaymentConnect:



On the PayPal Recurring Payment Terminal, you will see options for specifying trial period terms, regular recurring billing terms, and contact charge information.

The screenshot shows the 'AuthNet ARB Terminal' interface. The title is 'Set up an automated recurring billing profile'. The 'Processor Connection' is set to 'Authorize.net (45203)'. The form contains the following fields and options:

- Subscription Name:** Premium Plan
- Invoice Number:** (empty)
- Description:** Installation plan
- Subscription Start Date:** 4/3/2010 [4/3/2010]
- Sched. Payments Every:** 3 Month(s)
- Trial Amount:** (empty)
- Trial Occurrences:** (empty)
- Recurring Amount:** 250 USD
- Total Occurrences:** 4
- Payment Type:** Credit Card Charge eCheck
- Card Number:** 4111111111111111
- Card Expiration:** Jan 2013
- Card Code:** 123
- Load Address From:** Account Mailing Other
- Billing Address:** 123 Oak, Encinitas, CA, 92024, US
- Shipping Address:** (empty), City, State, Postal Code, Country
- Opportunity:** Acme Deal
- Account:** Acme
- Contact:** Joe Test

Buttons at the bottom: 'Cancel' and 'Create Subscription'.

The page provides lookup fields for Opportunity, Account and Contact, allowing users to establish relationships between the new payment profile and each of these objects, as well as radio buttons controlling the source of the address information to be used in processing the request.

When the form is submitted, a "create recurring billing profile" request will be sent to Authorize.Net. If Authorize.Net approves the request a new Payment Profile record will be created in Salesforce with status set to "Active".

As Authorize.Net processes each charge for the recurring billing profile, it will send a transaction notification to the PaymentConnect relay script configured for the processor, which will in turn create a new Payment record in Salesforce and attach it as a child of the Payment Profile.

When each Payment record is created, the values in the Payment Profile Opportunity, Account, Contact and On Payment Completed fields will also be inserted with the new Payment record.

Authorize.Net processes recurring payments in batch each night. While you may have received a success response from Authorize.Net when creating a recurring payments profile, you may not see the first payment appear in Salesforce until the following day.

See the PaymentConnect Developer Guide for details on integrating this terminal with custom workflow and passing parameters to the page.

The Payment Object

PaymentConnect Payment records are used to keep track of transaction details, including the time, date and amount of the transaction, and the current status, and also include controls that allow you to manage a payment after it has been processed (void, refund, cancel, etc.).

Creating Payments

The different methods for creating a new Payment record are shown below.

Using the Payment Terminal

The Payment Terminal can be accessed from various Salesforce objects, including Account, Contact and Opportunity records, and is used to process credit cards and eChecks from inside of Salesforce. Transaction information is entered via the terminal and posted to your payment processor. Then, when the processor responds with transaction approval or denial information,

PaymentConnect will post the response and information about the payment to a new or existing payment record.

Auto-Creating Payments from Inbound Payment Notifications

If your PaymentConnect settings have been configured to auto-create payments when a new payment notification is received, PaymentConnect will create and populate a new payment record when a new transaction is sent to the system from your website or payment processor merchant account. PaymentConnect includes a number of options to automatically find and attach related Contact, Account and Opportunity records when a new Payment record is created.

Scheduling Payments

Users can build multiple scheduled payment records (where Status = 'Scheduled') from the Opportunities detail page using the Schedule Payments custom link. This link opens an s-control that allows users to quickly create 1 or more payment records where the opportunity amount has been split into multiple payment amounts. The status of each of these new payment records will be set to "Scheduled".

Scheduled transactions can be loaded into the Payment Terminal when it comes time to process the payment. Just open the scheduled Payment record detail page and click on the Payment Terminal button.

Creating Payment Records Manually

Payment records can also be created and configured manually. Just click on the "New" button above the Payments section on any Account, Contact or Opportunity record, and fill in the payment information. To include these payments in standard PaymentConnect revenue reports, be sure to set the Status field to "Completed" when a payment has been received or processed successfully.

The Payment Log Field

Expand the Log section on any payment record details page to see the history of that payment. The log can be used to trace the history of a payment after it has changed state and can help in figuring out why a payment might have been declined or rejected.

The Payment Status Field

In most cases, PaymentConnect creates a Payment record just prior to submitting transactions to your payment processor and sets the status to "In Process" ¹. Then as transaction results and update notifications are received, the system updates the

¹ Except in the case of inbound payment notifications where Payment records are created as new payment notifications arrive.

status field with the current status of the transaction ("Declined", "Completed" and so on.)

If a subsequent notification is sent from the payment processor (i.e. an expiration notice for an authorization that has lapsed), the Payment record status will be updated again.

Please note that not every state listed below is available in the status picklist for payment records, as these are status sent by your payment processor and don't make sense in the context of creating a Payment record by hand.

Payment Record Status Values

Status	Description
Scheduled	Not yet submitted to a payment processor - but scheduled to be paid. Workflow rules can be constructed to check this state value and the "Scheduled Date" field to initiate payment reminders and other collections activities.
In Process	The payment has been submitted to the payment processor, but a response has not yet been received.
Completed	The transaction has been process successfully.
Error	An error occurred either during the process of transmitting a payment to the payment processor, or at the processor.
Failure	An error was returned from the payment processor.
Pending	The payment is being held for review at the payment processor.
Authorized	The payment has been authorized, but not captured.
Voided	The payment has been voided.
Expired	The authorization for this payment has expired. Check with your payment processor to determine their policy for how long an authorization can be kept open.
Reviewing	<i>(Google Checkout)</i> REVIEWING is the default financial state for all new Google Checkout orders. Upon receiving a new order, Google reviews the order to confirm that it is chargeable. After determining that the order is chargeable, Google will update the financial order state to CHARGEABLE.

Chargeable	<i>(Google Checkout)</i> The CHARGEABLE state indicates that you may charge the customer for an order by sending a Charge Order request. You may also cancel the order by sending a Cancel Order request.
Charging	<i>(Google Checkout)</i> The CHARGING state indicates that Google is in the process of charging the customer. Any actions taken on an order in this state will be invalid. Once the charge has been completed, Google will send a notification to PaymentConnect to update the financial order state to CHARGED, even if you only charged the customer for part of the order. However, in the case of a partial charge, the remaining balance on the order will still be chargeable even though the financial order state is CHARGED rather than CHARGEABLE.
Charged	<i>(Google Checkout)</i> The CHARGED state indicates that you have fully or partially charged the customer for an order. If you have partially charged the customer, the order will still be chargeable until you have charged the customer for the full order amount.
Payment Declined	<p><i>(Google Checkout)</i> The PAYMENT_DECLINED state indicates that Google's effort to authorize or charge the customer's credit card failed. If this happens, Google will email the customer to request a new credit card. The customer will have 72 hours to submit a new card.</p> <ul style="list-style-type: none"> • If the customer submits a new credit card for an order that previously failed authorization, Google will send you an order-state-change-notification indicating that the order's financial update status has been updated to CHARGEABLE. • If the customer submits a new credit card for an order that previously failed to charge, Google will charge the credit card and send you an order-state-change-notification indicating that the order's financial update status has been updated to CHARGED.
Cancelled	<i>(Google Checkout)</i> The CANCELLED state indicates that the merchant issued a cancel-order command, canceling the order. Once an order is cancelled, you may no longer update the order's financial order state. You may cancel an order that is in either the CHARGEABLE or the PAYMENT_DECLINED financial state. You may not cancel an order that has already been charged until you have already issued a refund for the offer.
Cancelled_by_	<i>(Google Checkout)</i> The CANCELLED_BY_GOOGLE state

google indicates that Google cancelled an order. Google may cancel an order if the credit card authorization fails and the customer does not provide a new credit card within 72 hours. Google will send PaymentConnect a notification indicating that the order was cancelled, and the reason tag in the notification will explain why Google cancelled the order.

Refunded (*Google Checkout*) The Refunded state indicates that you have fully refunded a previously Charged transaction.

Payment Record Action Buttons

Once a transaction has been submitted to your payment processor, action buttons will appear on the payment details page allowing you to submit follow-on transaction requests such as Void, Charge, and Approve. The options available to you will depend on the services supported by payment processor used to initiate the transaction (see below).

Payment Detail		Edit	Delete	Clone	Payment Terminal	Payment Terminal
Payment Name	Payment for Magazine Subscription					Owner
Transaction Type	Payment					Contact
Payment Type	Instant					Opportunity
Amount	\$24.00					Account
Currency ISO Code	USD					Parent Transaction
Scheduled Payment Date						Check Number
Payment Date	7/24/2009					Last 4 Digits
Status	Completed					Payment Processor
Invoice Number						Processor Connection
Transaction Id	9GS20329FL6721023					Subscription Id
Payment Profile						
▼ Other Related Objects						
Campaign						Case (Custom Field)
▼ Tax & Fees						
Shipping						Transaction Fee
Tax						
▼ Authorization						
Authorization Amount						Authorization Id
Auth Expiration						
▼ Memo						
Memo						
▼ Payment Management						
Capture		Void		Refund		Get Transaction Details
						PayPal Website
Capture Amount	<input type="text"/>	Submit				
On Payment Completed						
Merchant Custom Data						



PayPal Action Buttons

PaymentConnect provides the following action buttons for working with PayPal transactions.

Action	Description
Capture	Sends a partial or complete capture request to PayPal. The amount of the capture must be less than or equal to the authorized amount.
Void	Sends a void request to PayPal. If you are voiding a transaction that has been reauthorized, be sure to perform the void from the parent transaction (using the original transaction Id).
Refund	Sends a partial or complete refund request to PayPal. The amount of the refund must be less than or equal to the charged amount.
Get Transaction Details	Requests current transaction information from PayPal and displays it in a dialog box.

Authorize.Net Action Buttons

PaymentConnect provides the following action buttons for working with Authorize.Net transactions.

Action	Description
Capture	Used to complete an Authorization Only transaction that was successfully authorized through the payment gateway. Prompts for a capture amount and submits the request to Authorize.Net. The transaction status must be 'Authorized', cannot be captured, expired or errored, and the capture amount must be less than or equal to the authorization amount.
Void	Prompts the user for a reason (optional) and submits a void request to Authorize.Net.
Refund	Prompts the user for a refund amount and a reason (optional) and submits a refund request to Authorize.Net.

Google Checkout Action Buttons

PaymentConnect provides the following action buttons for working with Google Checkout transactions.

Action	Description
Authorize	Sends a request to Google Checkout to explicitly reauthorize a customer's credit card for the uncharged balance of an order to verify that funds for the order are available. You may issue an Authorize Order request for an order that is in either CHARGEABLE or CHARGED.
Charge	For payments with status = 'Chargeable'. Sends a request to Google Checkout to accept the transaction and run the charge.
Refund	Prompts the user for a refund amount, reason, and comments (optional) and sends a refund request to Google Checkout. The refund amount must be less than or equal to the amount charged.
Cancel	Prompts the user for a reason and comments regarding the cancellation and sends a cancel request to Google Checkout.

PaymentConnect has to wait for a response to post back from Google before updating the payment record, so it may be necessary to refresh the page sometimes before seeing an update from Google.

Payment Profiles

PaymentConnect provides the Payment Profile object for managing and reporting on recurring billing or subscription profiles and (if using the Secure Terminal add-on) stored credit card details.

Payment Profile record types:

AuthNet Subscription	SubscriptionStores information about an Authorize.Net subscription (ARB).
Credit Card	Credit Card profile information (Requires the PaymentConnect Secure Terminal add-on)
PayPal Recurring Payment	Stores information about a PayPal Recurring Payment profile.
PayPal Subscription	Stores information about a PayPal subscription
WorldPay Recurring Payment	PaymentStores information about a WorldPay recurring payment profile.

Each record type has a different page layout, containing fields supported by the record type's respective payment processor. For Payment Recurring Payment profiles and AuthNet Subscription profiles, the page layouts include a Payment Profile Management section with buttons that call the payment processor to change the status of the profile. For example, for PayPal, users have buttons supporting administrative actions such as cancelling, suspending, and updating profile details at PayPal.

The screenshot shows the 'Payment Profile' management page for 'Acme Deal'. At the top, there are navigation links: 'Back to List: Custom Object Definitions', 'Payments (0)', 'Open Activities (0)', and 'Activity History (2)'. The page is divided into several sections:

- Payment Profile Detail:** A table showing profile information:

Payment Profile Name	Acme Deal	Record Type	PayPal Recurring Payment [Change]
Profile Type	PayPal Recurring Payment	Contact	Grant Test
Subscription Status	Active	Account	Acme
Subscription Start Date	3/9/2010	Opportunity	Acme Deal
Processor Connection	PayPal Sandbox 2 (demo@linvio)		
PayPal Recurring Payment Id	SIM-I-1268169825407		
Description			
- Recurring Payment Setup Details:** A table showing payment parameters:

Initial Amount	\$30.00	Currency ISO Code	
Amount	\$45.00	Trial Amount	
Frequency	1	Trial Frequency	
Period	Month	Trial Period	
Trial Occurrences		Total Occurrences	6
- Payment Profile Management:** A section with buttons: 'Get Details', 'Cancel', 'Suspend', 'Reactivate', and 'Update Card Info'. Below the buttons is a text box for a reason and a 'Suspend Recurring Payment' button. A yellow starburst highlights the 'Suspend' button.
- Workflow:** Shows 'On Payment Completed' with 'Created By' and 'Last Modified By' both set to 'pmx Site Guest User, 3/9/2010 1:23 PM'. It includes 'Edit', 'Delete', and 'Clone' buttons.
- Payments:** A bottom section with a 'New Payment' button and a 'Payments Help' link.

It's important to note that editing the fields on a Payment Profile record will not change the details stored at your payment processor. For example, to cancel a recurring payment profile, you must use the "Cancel" button provided under "Payment Profile Management". This will invoke a call to PayPal, and if the

cancellation is successful, PaymentConnect will update the profile status value stored in your local Payment Profile record.

Payment Profile Action Buttons

The page layouts for PayPal Recurring Payment and AuthNet Recurring Billing record types include action buttons that can be used to send profile management requests to the payment processor. The options available to you will depend on the services supported by payment processor used to initiate the transaction (see below).

PayPal Recurring Payment Action Buttons


PaymentConnect provides the following action buttons for working with PayPal recurring payment profiles.

Action	Description
Get Details	Requests a quick report on the current profile details at PayPal. Includes the profile status, outstanding payments, next payment date and so on.
Cancel	Cancels the profile at PayPal. If the cancellation is successful, PayPal sends a cancellation notification back to PaymentConnect so the local profile record status can be updated.
Suspend	Suspends the profile at PayPal. If the suspend request is successful, PayPal sends a cancellation notification back to PaymentConnect so the local profile record status can be updated. Suspended profiles may be reactivated using the reactivate button.
Reactivate	Sends a reactivation request to PayPal. If the reactivation is successful, PayPal sends a notification back to PaymentConnect so the local profile record status can be updated and marked "Active" again.
Update Card Info	Allows users to send updated credit card information to PayPal, for use with the current recurring payments profile.

AuthNet Recurring Billing Action Buttons

PaymentConnect provides the following action buttons for working with AuthNet recurring billing profiles.

Processor Connection [Authorize.net \(45203\)](#)

AuthNet Subscription Id  SIM1269282218895

▼ Profile Management

Cancel Update Card Info

Enter a new card number and expiration date for this subscription profile:


Card Number:

Expiration: Jan 2011

Card Security Code:


Update Subscription

▼ Workflow

On Payment Completed  [ExtendMembership](#)

Created By [Ron Wild](#), 3/22/2010 11:23 AM Last Modified By [Ron Wild](#), 4/4/2010 10:52 PM

Edit Delete Clone

 **Payments** New Payment

Action	Description
Cancel	Sends a request to Authorize.Net to cancel the recurring billing profile.
Update Card Info	Allows users to send updated credit card information to Authorize.Net, for use with the current recurring payments profile.

Payment Profiles and "On Payment Completed"

The **On Payment Completed** field on Payment Profiles can be used to trigger custom workflow rules and triggers for each payment processed as part of a recurring billing profile. If this field is assigned a tag value (e.g. "UpdateMembership") prior to receiving a recurring payment notification from the payment processor, PaymentConnect will copy the value from the Payment Profile, to the new Payment record field as it is attached to the Payment Profile. Then, when you create workflow rules or triggers to respond to the tag, you look for new Payments that have been marked "Completed" and have an **On Payment Completed** value of "UpdateMembership".

See the PaymentConnect Developer Guide for more detail on working with On Payment Completed tags.

Shopping Cart Items

PaymentConnect Shopping Cart Items are used to keep track of products or items related to a specific payment transaction.

Opportunity Line Items Vs. Shopping Cart Items

Itemized purchases can be tracked in two ways using PaymentConnect. The first approach is to Payment records with Opportunities and take advantage of the built-in support for opportunity line items, total amount calculation, and pricebooks. This approach is useful in cases where you may want to relate multiple items to an Opportunity, as well as multiple Payment records.

The second approach is to makes use of Shopping Cart Items, and attach them to a Payment record. This method works in cases where you always have one payment for a set of purchased items, and allows you to process payments, create invoices, integrate with a third-party shopping cart application, and even set up post-payment processing rules without having to work with Opportunities. Your particular business model will determine which, if either, method is the best implementation.

Shopping Cart Item Fields

The following custom fields are included with the Shopping Cart Item object:

Field	Description
Name	The name assigned to the Shopping Cart Item. This is typically the product name.
Product	Product lookup field for the item being purchased.
Product Code	The product code for the item being purchased. This field is provided as an alternative to using the Product lookup field.
Quantity	The number of items.
Lead	The lead associated with the current Shopping Cart Item. This field can be used to keep track of a lead's shopping cart content prior to a purchase.
Contact	The contact associated with the current Shopping Cart Item. This field can be used to keep track of a contact's shopping cart content prior to a purchase.
Payment Completed	Set automatically when the parent Payment record is marked "Completed". This checkbox can be used to

initiate post-payment workflow related to the Shopping Cart Item. To disable the auto-update of this field, go to the PaymentConnect settings area and uncheck Update Shopping Cart Items.

On Payment Completed Provided for the user to fill with post-payment actions. Just edit the pick list values for this field. set the field when creating the Shopping Cart Item record, and construct workflow or Apex triggers to look for the **Payment Completed** flag and your **On Payment Completed** values before running.

TIP: Set up post-payment workflow using the Payment Completed checkbox and On Payment Completed picklist fields.

If the Update Shopping Cart Items checkbox is checked in the PaymentConnect settings area, the Payment Completed checkbox will automatically be checked when the parent Payment record is marked "Completed". You workflow rules can trigger off of this field and other fields on the Shopping Cart Item record, including the On Payment Completed multi-picklist and Product lookup field.

Payment Handling Scenarios

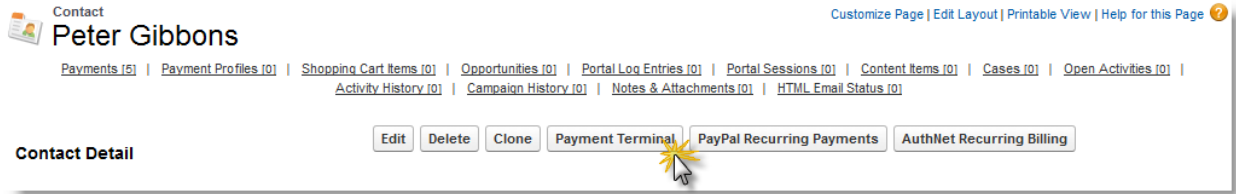
The following sections describe a few of the types of payment handling scenarios supported by PaymentConnect and the steps required to complete them.

Charging a Credit Card over the Phone

To take card information over the phone and enter it directly into Salesforce you will need to have PaymentConnect connected to a PayPal or Authorize.net account (as these processors support remote terminals) and one of the PaymentConnect terminals.

For this example, we'll use the standard PaymentConnect payment terminal (non-recurring payments):

1. Find the customer Contact record in Salesforce.
2. Click on the Payment Terminal button



3. Fill in the fields on the terminal providing:
 - a. A name for the payment record
 - b. Credit card information (provided by the customer over the phone)
 - c. Billing and shipping information
4. If the customer’s address information has changed, you can store the changes to the Contact record by clicking “Save Changes to Contact”.
5. Click “Review Transaction”, make sure the transaction details are correct, and then click “Submit Transaction”

Figure 3. The Payment Terminal is used to initiate credit card and ACH charges from inside Salesforce. Payment records are created as output from each transaction.

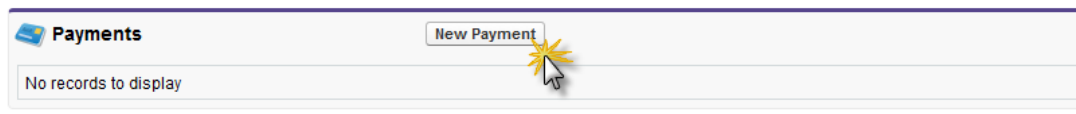
PaymentConnect will send a charge request to your payment processor and create a new Payment record in Salesforce. The status field on the Payment record will be set to match the transaction response from your payment processor.

After the transaction has been submitted, PaymentConnect will open the new Payment record detail view in your browser. For declined or failed transactions, you can re-run the transaction and reuse the payment record by clicking on the Payment Terminal button at the top of the Payment record detail view.

Entering Checks

Payments by check may be entered as follows:

1. Find the payee Contact record.
2. Click "New Payment" above the Payments related list.



3. Enter a name for the payment, describing what the payment is for.
4. Set the Transaction Type to "Payment".
5. Set the Payment Type to "Check or Money Order"
6. Enter the Amount and currency of the payment.
7. Enter the Payment Date
8. Set the Status field to "Completed" so that reports and other functions will know that this payment has cleared and should be included in revenue calculations.

9. Enter the Check Number
10. Select related Opportunity, Contact and Account lookup values as needed.
11. Payment processor-related fields such as Payment Processor, Transaction Id, and Last 4 Digits should be left empty or set to “—None—”.
12. If you have build workflow around the On Payment Completed field and need to trigger the workflow, select the appropriate pick list value(s) before saving your check Payment record.
13. Save the Payment record.

Entering Cash Payments

The cash payment entry process is identical to the check payment entry process described above, except you should set the Payment Type to “Cash” and leave the Check Number field empty.

Capturing Previously Authorized Transactions

To capture a previously authorized transaction, go to the Payment record detail page and locate the Capture button under the Payment Management section

heading. The options displayed under Payment Management will vary based on the payment processor used to create the transaction. For Google, you have the option to “Charge” a transaction if it has been reviewed and the status is set to “Chargeable”. For PayPal, you have the option to “Capture” previously authorized transactions.

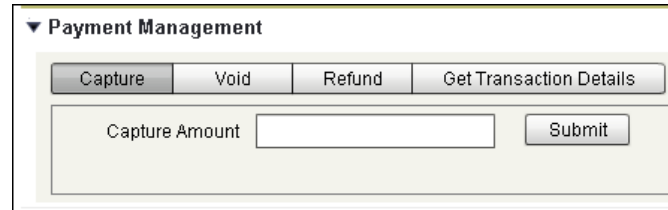


Figure 4. PayPal payment management buttons.

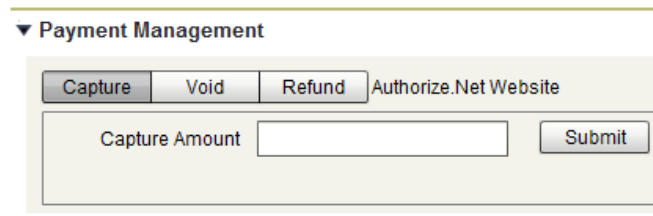


Figure 5. AuthNet payment management buttons.

NOTE: Authorize.net does not issue a new transaction Id when a previously authorized payment is captured, so PaymentConnect simply updates the payment record for that transaction – replacing the amount with the total amount captured. PayPal, on the other hand, issues a unique transaction Id for each capture, so PaymentConnect keeps the original Authorization record and adds each captured payment as a related transaction.

Refunds and Cancellations are handled in the same fashion using these Payment Management controls.

Setting up Recurring Payments

In addition to the Payment Terminal, PaymentConnect provides two recurring payments terminals that can be used to create recurring payment profiles through Authorize.net and PayPal. PaymentConnect also provides options for scheduling payments natively in Salesforce but does not automatically run credit card charges for this type of scheduling. Both methods are explained below.

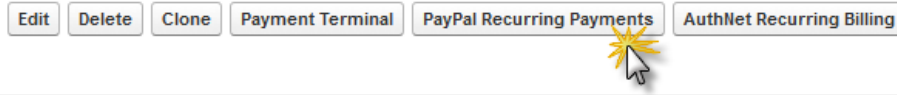
PayPal Recurring Payments

To set up a PayPal recurring payments profile from inside Salesforce you will need a PayPal Website Payments Pro account with the Recurring Payments service enabled. (PayPal charges an additional fee for this service)

PayPal Recurring Payments Terminal

The follow steps are required to create a recurring payment profile through PayPal:

1. Open the PayPal Recurring Payments Terminal. PaymentConnect provides a "PayPal Recurring Payments" button for Contact and Opportunity records, however your system may have been customized to launch this terminal from other objects as well. The PayPal Recurring Payments button should be available at the top of the Contact or Opportunity page layout as shown below:



2. Enter the payment information for your recurring payment, including name, amount, frequency, period, credit card information and so on. The help icons next to many of the fields on this terminal display tips on how to fill in the terminal. Please consult the PayPal documentation for any additional detail required on how these fields are used.

PayPal ARB Terminal PayPal

Set up a recurring payments profile

Subscription Name Coffee Mug of the Month	Opportunity <input type="text"/>
Description <input type="text"/>	Account <input type="text" value="Initech"/>
Subscription Start Date 3/30/2010 [3/30/2010]	Contact <input type="text" value="Bill Lumberg"/>
Profile Reference <input type="text"/>	
Initial One-Time Amount <input type="text"/>	
Trial Amount <input type="text"/>	
Make Trial Payments Every <input type="text"/> Day(s) <input type="text"/>	
Trial Occurrences <input type="text"/>	
Recurring Amount 10 USD <input type="text"/>	
Schedule Payments Every 1 Month <input type="text"/>	
Total Occurrences 12	
Card Type: <input type="text" value="Visa"/>	
Card Number <input type="text" value="4123456789012345"/>	
Card Expiration <input type="text" value="Jan"/> <input type="text" value="2016"/>	
Card Code <input type="text" value="132"/>	
Load Address From: <input type="radio"/> Account <input checked="" type="radio"/> Mailing <input type="radio"/> Other	<input type="radio"/> Account <input checked="" type="radio"/> Mailing <input type="radio"/> Other
Billing Address <input type="text" value="1234 Lumberg Dr."/>	Shipping Address <input type="text" value="1234 Lumberg Dr."/>
City <input type="text" value="San Diego"/>	City <input type="text" value="San Diego"/>
State <input type="text" value="CA"/>	State <input type="text" value="CA"/>
Postal Code <input type="text" value="92007"/>	Postal Code <input type="text" value="92007"/>
Country <input type="text" value="US"/>	Country <input type="text" value="US"/>
<input type="button" value="Cancel"/> <input type="button" value="Create Subscription"/>	

3. Click "Create Subscription".

PaymentConnect will post a "create new profile" request to the PayPal and then (if PayPal returns a success response) create a new Payment Profile record with the

status set to "Active". As subsequent recurring payments are processed by PayPal, transaction notifications will be posted to PaymentConnect and scripts will automatically create new Payment records and attach them to the Payment Profile created earlier.

Authorize.net Automated Recurring Billing

To set up an Authorize.net Automated Recurring Billing (ARB) profile from inside Salesforce you will need a Authorize.net gateway account with the Automated Recurring Billing enabled. (There may be an additional fee for this service)

AuthNet Recurring Payments Terminal

The follow steps are required to create a recurring payment profile through Authorize.net:

1. Open the AuthNet Recurring Billing Terminal from any Contact or Opportunity record. The AuthNet Recurring Billing button should be available at the top of the Contact or Opportunity page layout as shown below:
2. Enter the payment information for your recurring payment, including name, amount, frequency, period, credit card information, etc. Please consult the AuthNet documentation for more detail on the fields required in setting up an Authorize.net ARB profile.

AuthNet ARB Terminal Authorize.net

Set up an automated recurring billing profile

Subscription Name <input type="text" value="ARB Subscription Profile"/>	Opportunity <input type="text"/>
Invoice Number <input type="text"/>	Account <input type="text" value="Milton Waddams"/>
Description <input type="text" value="Red stapler payment plan"/>	Contact <input type="text" value="Milton Waddams"/>
Subscription Start Date <input type="text" value="3/30/2010"/> [3/30/2010]	
Sched. Payments Every <input type="text" value="1"/> Month(s)	
Trial Amount <input type="text"/>	
Trial Occurrences <input type="text"/>	
Recurring Amount <input type="text" value="10"/> USD	
Total Occurrences <input type="text" value="12"/>	
Payment Type: <input checked="" type="radio"/> Credit Card Charge <input type="radio"/> eCheck	
Card Number <input type="text" value="4123456789012345"/>	
Card Expiration <input type="text" value="Jan"/> <input type="text" value="2021"/>	
Card Code <input type="text" value="123"/>	
Load Address From: <input type="radio"/> Account <input checked="" type="radio"/> Mailing <input type="radio"/> Other	
Billing Address <input type="text" value="1234 Lumberg Dr."/>	Shipping Address <input type="text" value="1234 Lumberg Dr."/>
City <input type="text" value="San Diego"/>	City <input type="text" value="San Diego"/>
State <input type="text" value="CA"/>	State <input type="text" value="CA"/>
Postal Code <input type="text" value="92117"/>	Postal Code <input type="text" value="92117"/>
Country <input type="text" value="US"/>	Country <input type="text" value="US"/>
<input type="button" value="Cancel"/> <input type="button" value="Create Subscription"/>	

3. Click "Create Subscription".

PaymentConnect will post a "create new profile" request to the Authorize.Net and then (if Authorize.Net returns a success response) create a new Payment Profile record with the status set to "Active". As subsequent recurring payments are processed by Authorize.Net, transaction notifications will be posted to PaymentConnect and scripts will automatically create new Payment records and attach them to the Payment Profile created earlier.

NOTE: Authorize.net runs ARB charges in batch at night, so you may not see your first payment on a new recurring billing profile until the next day.

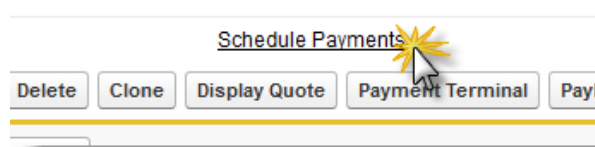
Native Scheduling of Payments

Scheduling of payments can also be done natively in Salesforce, however PaymentConnect will not automatically perform credit card charges when payments come due as PayPal and Authorize.net do. Instead of using Payment Profiles and sending subscription details to the payment processor, this method simply involves creating a Payment record, setting the status to "Scheduled" and filling in the Scheduled Payment Date field. While scheduling payments in this fashion does not cause payments to be processed automatically, it does allow Salesforce users to keep track of when payments should be processed. For example, you can set up a

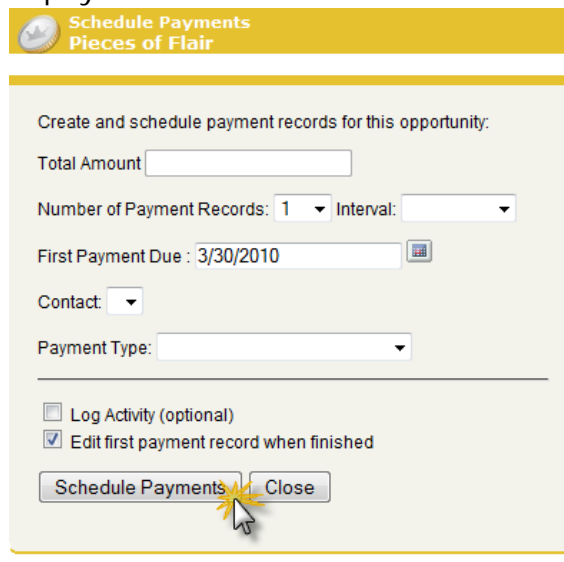
workflow rule to remind your collections department to bill a customer, or automate the delivery of an invoice to the customer. When the payment is received, or processed, your staff can open the scheduled payment and process it using the Payment Terminal, or update the record status manually (e.g. for a check received.).

Scheduled Payments can be created manually, or using an SControl provided with PaymentConnect. Steps for automatically building multiple scheduled payments from a Closed/Won Opportunity using the Schedule Payments SControl:

1. Mark the opportunity Closed/Won
2. Click on the custom link "Schedule Payments" on the Opportunity detail page



3. Select the number of payments and the interval between each payment.



4. Click "Schedule Payments"

PaymentConnect will build Payment records (for this example, it will build three). Each one with status = "Scheduled", Scheduled Payment Dates will be filled in, and each payment will be named "Payment 1 of 3 ...", "Payment 2 of 3..." and so on.

These Scheduled Payment records can now be used as placeholders for payments you expect to receive for the current opportunity.

Sending a Customer an Online Quote

One of the advantages of using PaymentConnect with Salesforce is the ease by which you can connect sales opportunities to the payment process and update

opportunity status when payments are completed. While you can create your own custom order-to-payment processes using PaymentConnect components and Visualforce, as of version 3.15 PaymentConnect includes a built-in Visualforce page that provides this functionality at a basic level. Linvio also offers an add-on for PaymentConnect called “Quotes & Invoices” that provides more advanced quote handling functionality and flexibility.

SiteQuote Page

SiteQuote is a pre-built Visualforce page that allows you to publish Opportunity record details to a public page where your customer can enter card information and complete payments online.

This page can be styled using the Site Template feature in Salesforce, and is driven by the values in specific fields on your Opportunity record. To enable the SiteQuote feature, have your administrator install and configure the SiteQuote Visualforce page on your Salesforce Sites website and setup a URL field on the opportunity page layout that can be used to access the SiteQuote page

(e.g.

https://mysite.secure.force.com/quote/pymt__SiteQuote?id={!Opportunity.Id}&showDescr=1)

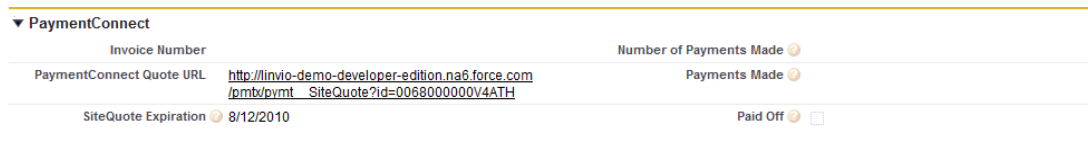


Figure 6. Your Opportunity page layout should include a SiteQuote Expiration date field as well as a URL for accessing the SiteQuote page. Consult the PaymentConnect configuration guide for instructions on setting up the SiteQuote feature if these aren't visible.

In order to publish a quote using the SiteQuote page your Opportunity MUST have values in the **Amount**, **Account** and **SiteQuote Expiration** fields, and the Opportunity must have a related Opportunity Contact. The **Paid Off** field must also be unchecked, as this indicates to the SiteQuote page that order has been paid.

Steps to publish an Opportunity SiteQuote:

1. Create your Opportunity record.
2. Make sure you have added an opportunity contact to the record.
3. Make sure you have assigned an Account to the opportunity and ensure that the billing address on the account is complete.
4. If you add opportunity line items, Salesforce will auto-fill the amount field. If not, enter an amount for the opportunity.
5. If your admin has configured the SiteQuote feature to display description field values on the SiteQuote page, enter notes to the customer, payment terms or other information into the **Description** field.

6. Set the SiteQuote Expiration date to some date in the future to activate the SiteQuote page for the current opportunity.
7. Click on the SiteQuote URL to ensure that everything has been configured correctly. If the quote does not display the Opportunity details and a payment link, double-check your setup.
8. Email the SiteQuote URL (with the id for the current Opportunity embedded in it) to your customer.

When the customer clicks on the link they will see a quote page where they can make a payment on the Opportunity online.

When the customer payment is processed, PaymentConnect will add a Payment record to your account, connecting it with the original Opportunity record and will update the **Payments Made**, **Number of Payments Made**, and **Paid Off** fields on the record.

Additional Help

For more information visit the Linvio website at www.linvio.com or our forum www.linvio.com/forum .

Consulting and integration services are also available from Linvio.

Linvio, Inc.
sales@linvio.com
(860) 546-8466