Chargent Release Notes

Chargent - 6.0

Release Details

Release Title

Chargent 6.0

Release Date

February 1, 2020

Release Installation URL

To install, click the following link:

https://www.appfrontier.com/chargent-installation

Release Overview

Chargent 6.0 is a milestone release that delivers new features, a large list of bug-fixes, app refinements, and new gateway integrations.

Furthermore, this release has been vetted using our improved testing methods through each step of development, and has passed Salesforce.com's stringent Security Review process, making for the most secure, consistent, and seamless experience available to Salesforce customers.

New Features

Payment Request v2

We've rebuilt our popular Payment Request feature from the ground up. This new version drastically simplifies the setup process, allowing you to get Payment Request up and running in minutes with no developer support. Making adjustments to your Payment Request pages in this new version is a breeze. Furthermore, this update adheres to Salesforce.com's 2020 Guest User security changes.

Take Payment Component for Communities

Just like our Chargent Anywhere component payment-enables ANY Salesforce object, our new Take Payment component does the same for your Communities pages. It fits on any Communities page and takes only minutes to set up. Once configured, your Communities users can submit payments quickly and securely. These payments are sent directly to your payment gateway from your secure Salesforce Org, and are captured immediately in your Org as well. Learn more about our Take Payment component here.

Automated Collections

This new feature automatically communicates with customers - letting them know that they've missed a payment - and provides them with a Payment Request link that allows them to update their payment information and get their account back in the black. Automated Collections also allows you to automatically retry collecting payments based on the schedule and logic that you choose. The retry logic, dates, and email templates are chosen by you or your admin during configuration. It takes minutes to activate and, once configured, is a set-and-forget collection process.

NMI Gateway Integration

New and improved, now with tokenization! We've developed native NMI gateway integration to fully leverage all options and their native API functionality. No more emulation. Now customers using the NMI gateway will have full access to all their features. This was our most requested gateway upgrade request.

Zero-Footprint Tokenization

We've created a new tokenization component that allows our customers to quickly tokenize payment data and keep the amount of data stored in Salesforce to a minimum. This is achieved via a programmable lightning API and can be used anywhere within your Salesforce.com ecosystem. Customers with high record volume can leverage this feature to tokenize payment data without creating additional records, saving tens of thousands of dollars per year on data storage costs. Click here for the user guide.

Pause and Resume Call Recording with New Voice Media

This new feature is an integration with New Voice Media that allows you to configure Chargent to automatically halt New Voice Media's call recording as soon as the Chargent Payment Console is engaged, then resuming said recording as soon as the Payment Console is closed. This feature further enhances customer security as well as PCI compliance by preventing the recording of sensitive payment data. Click here for the user guide.

Cash Inflow Dashboard

Chargent now ships with our Cash Inflow Dashboard, which provides a comprehensive look at payment collections from the last year, the last month, and the coming thirty days. This dashboard also provides quick breakdowns of payment frequency and payment methods. Staying on top of what you've collected and what you're about to collect is now much easier.

Permission Set Assignments

Chargent now allows for Permission Set assignment directly within Chargent Settings via an easy to use interface.. Admins no longer need to navigate away from Chargent Settings in order to add/remove/edit user's Permission Sets.

Strong Customer Authentication

We've implemented Strong Customer Authentication (SCA) into our Adyen and Cybersource gateway integrations. Activating SCA improves consumer protection within the payment process, and adheres to the Payment Services Directive (PSD2) initiative.

App Refinements

Lightning Layout Optimized

Our object layouts have been updated to better display relevant fields and statuses, providing more information before having to scroll. Additionally, we've removed fields that are typically unneeded from the default Page Layout. We've also updated Field Descriptions and Help Text for every Chargent Order Object field. Finally, we've added hover details and highlight panels to our objects to further enhance relevant data visibility. (Customers upgrading to this package will need to manually activate the following Chargent Orders Page Layout: Chargent_Order_Record_Page_v3)

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Linked2Pay Gateway: Transaction Fields

We've added Authorize, Refund, Partial Refund, and Void functionality to Chargent for customers using the Linked2Pay Gateway. This version also adds greater detail to Linked2Pay gateway responses by mapping additional data fields for each transaction completed.

Unresolved Transaction Error - Fixed

Corrected an issue where an error was thrown due to unresolved transactions having no associated Chargent Order record populated. Now these transactions will be listed and visible, but will not throw an error and can be manually deleted.

Auth.net Gateway: Special Characters Error - Fixed

Resolved an issue where the Authorize.net gateway would return an error when special characters (such as the ampersand (&) character) were used in the Billing Company name and other fields.

TChargentResult Message Update

The Chargent API messaging has been standardized and now provides clearer, more full response data from our integrated gateways.

Auth.net Gateway: Mapped Transaction Status

This fix provides full error data for instances where tokenization through Authorize.net has failed.

Amex Cards in Payment Request - Fixed

Fixed a bug that caused some American Express cards to fail within our Payment Request feature.

Payment Request Error "No Transaction Package" - Fixed

Fixed a bug wherein the Payment Request page would show a "No Transaction Package" error due to the guest user not being automatically assigned the needed Permission Sets.

Account Updater Expiration Hours Bug - Fixed

Fixed a bug wherein an internal error occurred when the Account Updater link expiration was set to "0."

Sandbox Feature Activation Emails - Fixed

Feature activation is no longer required for Sandbox installation of Chargent. All chargent features are enabled by default for Sandbox installations so that customers and prospects may test and review our full feature set.

Salesforce Critical Update & @AuraEnabled Apex Methods - Fixed

Fixed a bug wherein Salesforce's Winter '21 update resulted in some users losing access to Apex Controllers, as well as access to Chargent Anywhere and some Chargent Order / Transaction buttons. This release also caused button color issues.

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Payment Request Preview Page Bug - Fixed

Fixed bug wherein the preview functionality for Payment Request would not work the first time a user configured the feature.

Currency Symbols in Payment Request - Fixed

Fixed bug that caused improper currency symbols to display on our Payment Request form.

Braintree Gateway: Country Mapping Error in Braintree Integration - Fixed

Corrected an issue where Country Mapping was sending the wrong ISO code in some cases for Braintree.

Braintree Gateway: Merchant Account ID

Updated our Braintree integration so that the Merchant Account ID field is sent with transactions.

Auth.net Gateway: Held for Review Responses - Fixed

Corrected an issue where Authorize.net's Advanced Fraud Detection (AFD) suite would hold a transaction for review, but appear to be successful in Chargent. Now these transactions are marked as Error until the customer reviews and approves the payment source used.

Auth.net Gateway: Credentials in Gateway Setup Wizard

Enhanced Authorize.net authentication within the Gateway Setup Wizard.

Auth.net Gateway: AVS Token - Fixed

Fixed issue wherein a user updating the billing address from Authorize.net's CIM tool would not provide updated token.

Card Data Handling via Payment Request - Fixed

Fixed bug that caused the Card Number field to not clear upon a successful payment received via our Payment Request feature.

Account Updater & Payment Request v2 Bug - Fixed

Fixed bug wherein our Account Updater feature could not function in Orgs where the newest version of Payment Request is configured. Account Updater now leverages Payment Request v2 with no issues.

Chargent Base and Orders Passed Security Review

While we do believe that Chargent has long been the most secure payment application on the AppExchange, we did, like many Salesforce ISVs, need to back that claim up through Security Review. We have been working diligently on this effort and are quite proud to say it is ready for you, our valued customers!

Chargent / Accounting Seed Connector and Default Bank Accounts - Fixed

Fixed an issue where customers setting Default Bank Accounts in their Accounting Seed app prevented the Bank General Ledger Account field from being properly populated when Cash Receipts and Cash Disbursements are logged.

Cannot Close Payment Console after Recurring Setup Bug - Fixed

Fixed bug wherein the Payment Console modal could not be closed after setting up a recurring payment.

Token Registration after Authorization / Charge in Payment Request Bug - Fixed

Fixed bug wherein the payment token was not registered and the Card Number field was not deleted after authorizing or charging using Payment Request within the SCA flow in the Adyen gateway.

Transaction Record not Created in Batch Processing for Invalid Card Numbers - Fixed

Fixed bug wherein our recurring batch failed to create transaction records if the card number used was invalid or if tokenization was enabled on a gateway that uses single-calls. Each action taken within Chargent should result in the creation of a record, even when the transaction fails or is declined. This makes for the most accurate tracking and reporting.

Debug Mode & Chargent Orders Object - Fixed

Fixed bug wherein Debug Mode provided no debug information for transactions initiated from the Chargent Order object.

Expanded Retry Date Options for Automated Collections

We've expanded the retry options so that stages can be triggered on a more granular and wider schedule. When choosing the "X Days After" option, users may anywhere between 1 and 30 days after.

Moneris Gateway: Order Information Field Addition

Chargent now maps the Moneris API field "order_id", providing greater transaction detail for customers using the Moneris payment gateway.

NMI Gateway: Payment Method Error - Fixed

Fixed an issue wherein orders were sending both bank account and card payment data, resulting in an error message.

Payment Request with No Email on Contact Record Bug - Fixed

Fixed bug wherein Payment Request records were not created if the billing Contact has no Email address listed. This scenario will now result in an error message that instructs the user to populate the email address field for that contact.

API Tokenization Update - Fixed

Fixed an issue that prevented card authorizations via our API.

Improved Account Updater Error Messages

Improved error message clarity for our Account Updater feature.

Billing Data & Amount in Unlinked Refunds - Fixed

Fixed an issue wherein billing data and amounts weren't being sent to the gateway when an unlinked refund was processed.

Cybersource Custom Mapping - Fixed

Fixed an issue wherein Cybersource Custom Mapping caused payment errors.

Chargent Opportunities Package Updates

We've updated our Chargent Opportunities package with improvements including

- Clearer, more informative Account Updater error messages
- Chargent Anywhere now allows pending authorizations to be ignored so that stand-alone payments can be submitted
- Removed fields no longer used or needed for Transaction records
- Fixed an issue wherein permission checks caused errors
- Updated Payment Request to our latest version

Chargent Cases Package Updates

- Updated Payment Request to our latest version

Automated Collections Batch Issue - Fixed

Resolved an issue wherein the Automated Collections Batch required manually scheduling. The AC batch will now schedule itself for new installations. NOTE: customers who experienced this issue in an earlier version of Chargent may still need to manually schedule this batch initially. Once scheduled, it will run on the configured dates / times.

Gateway Settings & Credentials Validation - Fixed

Fixed a bug that prevented the saving of new settings or credentials when updated form the Gateway Setup Wizard.

Transaction Record Creation with Invalid Card Numbers - Fixed

Resolved an issue wherein invalid card numbers on a Chargent Order record could prevent Transaction records from being created by the Chargent recurring batch.

Uncommitted Work Pending Issue - Fixed

Fixed a bug that caused an "uncommitted Work Pending" error during token registration in non-single call gateways.

Added Ability to Control Sender Email Address in Automated Collections

We've updated our Automated Collections feature to allow you to control the sender email address. This address will apply to all emails sent from Automated Collections initially, however a future version of AC will allow you to control this at a per-stage level.

Feature Activation Error & Account Updater Issue - Fixed

Fixed a bug that caused feature activation errors when attempting to update cards via the Chargent Account Updater feature.

Payment Request Creation via [New] Button Issue - Fixed

Resolved an issue wherein creating a Payment Request using the [New] button in the Payment Requests List View resulted in an error message.

Payment Details Button in Payment Console Issue - Fixed

Resolved an issue wherein the [Payment Details] button in Payment Console became unresponsive when setting up a recurring payment.

No Transaction Package Installed Error - Fixed

Resolved an issue wherein the Payment Request or Account Updater pages would display an error message that read "No Transaction Package Installed…" For Payment Request, this occurred when the Payment Request was created using a Billing Contact.

Transactions and Tokens not Created in Account Updater - Fixed

Resolved an issue wherein Account Updater would update the card number, type, and last 4, but not created the token or needed Transaction record.

Charge API Call 'Amount' Error - Fixed

Resolved an issue wherein charging via the API resulted in an error: "Please enter an amount" on the Transaction record.

Cybersource SCA Fields Help Text - Updated

Updated the required SCA fields help text in the Gateway Setup Wizard for Cybersource. 'API Key,' 'API Identifier,' and 'OrgUnit ID' help text is now more descriptive.

Take Payment LWC Updated to Work on Non-Object Community Page

Updated the Take Payment Lightning Web Component to work on Community pages not based on existing objects.

Gateway Setup Wizard Stalling Issue - Fixed

Fixed an issue wherein the Gateway Setup Wizard would not proceed to the next step after entering gateway credentials and clicking the [Sign In] button.

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Vantiv Gateway Update

We've updated our integration to the Vantiv gateway and are now leveraging their newest API, v12. This version has enabled us to offer two of Vantiv's newest features, Automatic Account Updaters & Asynchronous Transaction Sync.

New Features for Vantiv API v12

Automatic Account Updater (AAU)

Avoid missed / failed payments by enabling Vantiv's Automatic Account Updater. Contact your Vantiv rep to enable this feature. Once enabled, Chargent will capture a new token for any failed card or ACH payment as long as the new payment data has been updated at the Gateway level.

> **NOTE**: The decline reason must be related to a potential account change. For instance, an update will not occur for declines due to insufficient funds. It can take a couple of days before updated information is received.

The next time Chargent attempts to collect the payment with the outdated card information, the transaction has a better chance of success because Vantiv has passed the updated token back to the Chargent Order record.

Asynchronous Transaction Sync

Chargent can now update Salesforce records, long after the initial transaction, for ACH transactions that are returned for non-sufficient funds (NSF), credit card authorizations that expire, and more.

Two fields, *Transaction Status* and *Settlement Date* will now be updated through a daily scheduled batch in Salesforce to reflect the status of the transaction. (When upgrading from API v8 to v12, you may have to manually add these fields to the Chargent Transaction page layout.)

Upgrading to Vantiv API v12

Before upgrading to Vantiv API version 12, you must first:

1. Request v12 credentials from Vantiv eCommerce Merchant Support at (844) 843-6111

   Vantiv typically delivers new credentials within 2 to 3 weeks, so it is best practice to submit the request as soon as your organisation decides to implement API v12

2. In your Sandbox, click the App Launcher, then click the Vantiv Gateway record, then click the [Edit] button
3. Enter your new API v12 credentials, then click the [Sign In] button
4. Upon successful sign-in, click the [Advanced Settings] button
5. Choose "Vantiv v12" from the "Gateway Version" field, then click the [Save] button

Once complete, test your transactions in Chargent using Vantiv's test cards / account numbers, found here: http://vantiv-ecommerce.github.io/sandbox/

Current API v8 Users

If you don't intend to use either of the two new features offered in API v12, there's no need to upgrade to that version. Upon updating to Chargent Version 6.0 or higher, the "Gateway Version" field on your Gateway record should still reflect "Vantiv v8".

Vantiv API v8 still offers these features:

1. Card & ACH Tokenization
2. Level II Data
3. Level III Data
4. Refunds
5. Credits
6. Voids
7. Partial Capture of Authorizations
8. Multiple Currencies

If you *would* like to upgrade to the latest version of Vantiv's API, simply follow the directions above.

NOTE: Permission Sets for Cases and Opportunities Packages

In order to provide access to Chargent Transaction and Payment Request records in the Chargent Cases / Opportunities packages, these permissions will need to be granted by your Salesforce / Chargent Administrator. Salesforce does not allow our application to provide the needed read access for these objects.