

# Chargent

**PAYMENT PROCESSING FOR SALESFORCE**

by AppFrontier 

## Release Notes

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[Chargent v6.20]

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## Release Details

### Release Title

Chargent v6.20

### Release Installation URL

<https://www.appfrontier.com/chargent-installation.html>

## Release Overview

Chargent v6.20 brings major updates to two of our most popular features - Automated Collections and Payment Request. These updates focus on expanding the flexibility of these features in order to accommodate more use-cases. v6.20 also delivers fixes and app refinements to our core product.

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## Major Feature Updates

### Automated Collections

**Where:** This applies to Chargent Orders and Chargent Anywhere v6.20

The new version of our popular accounts receivable-focused add-on allows for the creation and simultaneous use of multiple Automated Collections Processes. This means that you can build and activate unique AC Processes for each of your customer types, collections scenarios, or other distinct use-cases. Each one of these AC Processes can be configured with their own Payment Request templates, email messaging, sender email address, and payment-retry schedules. The new version of Automated Collections allows you to create exactly the right process for the job in just a few clicks.

The configuration interface for Automated Collections in Chargent Settings has also been updated, making it easier to create and organize your AC Processes.

### Payment Request

**Where:** This applies to Chargent Orders and Chargent Anywhere v6.20

Like the new version of our Automated Collections add-on, Payment Request for our Chargent Orders package has been updated to allow for the creation and simultaneous use of multiple Payment Request templates. Within minutes, you can configure templates with distinct messaging, page layouts, and functional rules such as payment methods allowed. Once you've put together your Payment Request templates, simply choose which one to send at any given point. You can even mark a template as the default, and Chargent will remember the template last used for any given Chargent Order record.

Payment Request has also been updated to allow for customization of the payment form section titles (Billing Address and Payment Info), the Pay button text, and the Billing Address field labels. Want to use 'Province' instead of 'State?' You can do that. Want the button to read 'Donate' instead of 'Pay?' You can do that too.

These updates to Payment Request will also apply to the Chargent Account Updater feature: field customizations and requirements established in Payment Request will apply to the same fields in Account Updater.

The configuration interface for Payment Request in Chargent Settings has also been updated, making it easier to create and organize your Payment Request templates.

## Enhancements

### Payment Request Page - Now Mobile Ready

**Where:** This applies to Chargent Orders and Chargent Anywhere v6.20

We've updated the Payment Request page template so that it renders properly on mobile devices. The layout is now responsive in that it adjusts based on the screen resolution of the device being used, and the fields and buttons are more easily accessible via touchscreen input.

### Payment Request Page - Page Loading Improvements

**Where:** This applies to Chargent Orders and Chargent Anywhere v6.20

The Payment Request page now displays an animated placeholder until the payment form loads. This placeholder makes it more obvious for users with slower internet connections that the page is still loading and that the payment form will soon appear.

### Automated Collections - New Time Frame Options

**Where:** This applies to Chargent Orders and Chargent Anywhere v6.20

We've added new Time Frame options to Automated Collections. You can now set the first stage to trigger an email send as soon as AC triggers for a Chargent Order record, making your customer immediately aware of the payment failure. You can also set a specific day of the week as the time-frame option.

### Automated Collections - Updated AC & AC Stage Objects

**Where:** This applies to Chargent Orders and Chargent Anywhere v6.20

The Automated Collections and Automated Collections Stages records have been updated to better illustrate the status and result of that AC Process for a given Chargent order record. Understanding what was collected and how it was collected is now even easier.



## Fixes

### **BlueSnap Payment Gateway - ACH Transaction Issue - Fixed**

Fixed an issue wherein ACH transactions on the BlueSnap gateway resulted in an error: “Reason code 400. Shoppers have no relevant payment method ECP.”

### **Adyen Payment Gateway - Gate Record Creation Issue - Fixed**

Fixed an issue wherein a malformed endpoint prevented the Gateway Setup Wizard from accepting Adyen credentials and allowing the completion of the setup.

### **Automated Collections - Blank Gateway Issue - Fixed**

Fixed an issue wherein Automated Collections triggered for failed scheduled payments on Chargent Order records with no active Gateway record associated. New behavior: AC will not trigger on a Chargent Order record that has no active Gateway record associated. Record will instead switch to “Error” payment status and send an Email Notification to the Chargent administrator.

### **Payment Request - Billing Last Name Field Update Issue - Fixed**

Fixed an issue wherein the Billing Last Name field on Chargent’s objects were updated with the middle initial or middle name in instances where a Payment Request customer entered those items in the Name on Card field.

### **Automated Collections - Incorrect Payment Request Link - Fixed**

Fixed an issue wherein Automated Collections did not send the correct Payment Request link when stages were configured to do so.

## Known Issues

### Automated Collections Upgrades

Existing Automated Collections customers should complete the following steps **before upgrading to the latest version**:

1. Complete or halt triggered AC Processes for all Chargent Order records
2. Disable Automated Collections in Chargent Settings

Once these two steps are completed, upgrading to the latest version of Chargent will result in the new version of Automated Collections being added to Chargent Settings. From there, simply enable AC and configure your AC processes.

Note: the following update must be made to the 'Automated Collections Payment Request' classic email template for users who had AC 1.0 previously configured:

**Original Text:** [[merge field for amount due]]

**New Value:** [[amount due]]

### Preventing Duplicate Retries in Automated Collections & Salesforce Automation

As you may know, Salesforce's Automation order of execution is complex, and your automation may get caught during our call out to the payment gateway. This can cause duplicate calls to the gateway or failure to create Transaction records. As such, when creating automation alongside Chargent objects, it's best practice to create a delay for the action you are looking to execute.

#### Workaround

To best avoid this issue, simply add a delay in your Process Builder when creating / editing automation against Chargent objects. Do so by scheduling the action to execute 0 hours after a Date/Time field, which will delay the action to execute by a couple of minutes. This same approach should be used when creating / editing a Flow that involves writing to Chargent objects.

When it comes to Triggers, Salesforce recommends one trigger per object as a best practice since triggers don't follow a specific order during the Salesforce Order of Execution. Chargent comes packaged already with a Trigger on our objects. Our recommendation is that you do not add more triggers to Chargent objects.

## Payment Request emails after Summer '21 Update

Salesforce is implementing a change to the Guest User email address functionality that will affect Payment Request when configured on a Site created after June 12, 2021.

Details on this change are here: [Salesforce Article - Update Guest User's Email Address \(Update\)](#)

### Workaround

There's a workaround for this issue, though this is only be needed for:

1. New users setting up PR for the first time after the Summer '21 release is live
2. Existing PR users setting up a new PR on a Salesforce Site created after the Summer '21 release

Existing PR users leveraging a Salesforce Site created before the Summer '21 do not need to apply this workaround.

#### The workaround:

1. Navigate to Setup, then search for and click on "Email Alerts"
2. Click the Edit link next to "Customer Receipt"
3. Change the "From Email Address" to a value other than "Current User's email address". This will be the email address from which payment receipts will be sent. Note that this will apply to other transactions if they are configured to use this Workflow Rule.

## Payment Request - Billing Information Fields

We've added the ability to customize field visibility and requirements on the Payment Request payment form by leveraging Salesforce's Field Sets tools. Due to this, previously hidden 'Country,' Email Address,' and 'Phone Number' fields may reappear after upgrading to v6.20.

### Workaround

To control the visibility of these fields, navigate to Setup > Object Manager > Payment Request > Field Sets > Payment Request Form. From here, simply choose which fields you want visible on the Payment Request form by dragging and dropping between Order (in the Object panel) and the 'In The Field Set' section below. You can also mark fields as 'Required' by clicking on the wrench icon next to each field.

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## Payment Request Setup - 'Design' Page Loading

There is an intermittent issue wherein the 'Design' page of the Payment Request Setup wizard shows a loading animation only, never fully rendering the page.

### Workaround

If this occurs, refreshing the browser will resolve the issue. Note that any changes made to that Payment Request template prior to the browser refresh will be lost. We recommend saving your changes on each page before progressing to the next.

## Payment Request Page - Footer Issue

When upgrading from Chargent v6.15 or earlier to v6.20, the page footer formatting for Payment Request pages configured before the upgrade may display extra characters and symbols. Special characters and symbols may affect the payform visibility in the Payment Request Setup Wizard Preview functionality. This issue will be resolved in an upcoming update to Chargent.

### Workaround

Simply edit the footer and remove all special characters from that Payment Request template in Chargent Settings > Payment Request Setup, then save.

## Account Updater

When upgrading from Chargent v6.15 or earlier to v6.20, admins in Orgs with the Account Updater previously configured may find that the logo image, Country, Email Address fields are no longer displaying on the Account Updater page. This does not affect the core functionality of Account Updater, and your customers will still be able to update their card. This issue will be resolved in an upcoming update to Chargent.

### Workaround

To restore the visibility of Country and Email Address fields, create a new Payment Request template in Chargent Settings > Payment Request Setup. Mark the new template as Default, and delete the Legacy Payment Request template. This will restore those fields, and they will follow the rules and customizations that you apply to Payment Request. However this workaround will not resolve the logo image issue.