

Release Notes

[Chargent v6.40]

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Release Details

Release Title

Chargent v6.40

Release Installation URL

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

Release Overview

Chargent version 6.40 delivers our new Automated Collections Dashboard, Usage Billing, Gateway Usage report, and Data Aggregation Framework, as well as a list of app refinements and fixes.

New Features

Automated Collections Dashboard

Where: This applies to the Chargent Automated Collections Add-on, for use with Chargent Base & Orders v6.40 or higher.

Our new Automated Collections Dashboard provides you with an up-to-date view of the performance of your AC processes. This component can be configured anywhere you like, and will break down your AC data into meaningful, actionable analytics, including how much revenue AC is collecting for you, the success percentage of each AC process, the success of individual stages of your AC processes, and more. Configure a couple of AC processes and you're ready to do some A/B testing; this dashboard will serve as an immediate and intuitive view into the results of that test.

Configuring this component takes just seconds. This same suite of data is also provided to you in a standard salesforce dashboard with related reports.

Data Aggregation Framework

Where: This applies to Chargent Base & Orders v6.40 or higher.

This release includes the first phase of our data aggregation framework, which not only drives our new Automated Collections Dashboard, but also provides our users with detailed gateway and feature usage data. This is all part of our Smart Payments initiative, which we'll continue to develop and discuss in future releases. The philosophy is simple: data collection drives analytics, analytics drives smarter features, and smarter features empower our users.

Note: Data is aggregated in your Org in real time *as events occur*. As such, Automated Collections processes that were triggered but not yet completed prior to this update will only report on stages that executed *after* the update to v6.40.

New Report - Gateway Usage

Where: This applies to Chargent Base & Orders v6.40 or higher.

This release includes a new report called 'Gateway Usage - Monthly Usage.' This report displays the total number of calls made from the Chargent app to your Payment Gateway on a per month basis. For new installations, this report will appear on the Cash Inflow Projections dashboard.

Usage Billing

Where: This applies to Chargent Base & Orders v6.40 or higher.

Some of our customers - especially those who use Chargent to collect payments in their Communities or Portals - have asked for a billing model that more accurately aligns with their usage. We deliver exactly that in this release. Our Usage Billing option more easily scales as our customers' businesses grow and their volume increases.

Fixes

Payment Request - Billing State Field Dynamic Entry - Fixed

Fixed an issue wherein dynamic entry wasn't allowed in the State field in the Billing Information section of the Payment Request page.

Automated Collections - CC (internal) Email field Not Saving - Fixed

Fixed an issue wherein the CC (internal) Email field on the Automated Collections configuration page was not displaying the previously inputted value.

Cash Inflow Dashboard Report Type - Updated

The Report Type for the Cash Inflow Dashboard has been updated so that it no longer requires Chargent Order record association with Account Records in order to display data.

Note: This change currently applies to new installations only. A future update will be provided to apply this change for users upgrading from previous Chargent versions.

Transaction Sync Batch - Updating Settled Records - Fixed

Fixed an issue wherein the Transaction Sync batch did not ignore Chargent Transaction records with direct debit payments and a status of 'Settled.'

Chargent Anywhere Payment Console - Stop Rule Picklist - Fixed

Fixed an issue wherein the Chargent Anywhere Payment Console did not enable the appropriate fields depending on which Stop Rule value was selected.

Payment Request Page Not Loading in Spring '22 Preview - Fixed

Fixed an issue wherein Payment Request pages would not properly load in Orgs running the Spring '22 preview.

Take Payment Not Loading in Spring '22 Preview - Fixed

Fixed an issue wherein the Take Payment component would not properly load in Orgs running the Spring '22 preview.

"No Module" Error When Installing Chargent in Spring '22 - Fixed

Fixed an issue wherein installing Chargent in an Org running the Spring '22 preview would result in a "No Module" error.



Payment Console Activation Issue - Fixed

Fixed an issue wherein the Payment Console feature required activation after upgrading the Chargent application.

Automated Collections: Payment Stop Issue - Fixed

Fixed an issue wherein Automated Collections processes on Chargent Order records with a Payment Stop value of "Date" were not creating Transaction records.

Chargent Anywhere Payment Console Currency Issue - Fixed

Fixed an issue wherein Transactions created using Payment Console in Chargent Anywhere were not populating the defined currency.

Payment Console Triggering SCA Issue - Fixed

Fixed an issue wherein transactions executed from the Payment Console were triggering the Strong Customer Authentication (SCA) and being declined.

Known Issues and Problems

Automated Collections Dashboard Not Displaying Actions

Automated Collections users with existing AC Processes prior to upgrading to v6.40 may see that the Actions column in the Stage Success Rates section contains no values.

Workaround

To rectify this, simply navigate to Chargent App > Chargent Settings > Automated Collections, then click into each AC Process and click the [Save] button. Once complete, refresh the Automated Collections Dashboard and the appropriate values should appear in the Actions column of that section.

Usage Billing Report on Cash Inflow Projections

A new report has been created to display Gateway Usage. For new installs, this report will appear on the Cash Inflow Projections dashboard by default. It will not, however, appear on that dashboard for users upgrading to Chargent v6.40.

Workaround

The Gateway Usage component can be added manually to the Cash Inflow Projections dashboard:

1. Navigate to Dashboards by clicking on the App Launcher and searching / selecting Dashboards
2. Click the [Edit] button at the top-right corner of the dashboard
3. Click the [+ Component] button at the top of the screen
4. Click on 'All Reports' from the left-side navigation
5. Search for 'gateway usage' in the search bar at the top of the screen
6. Click 'Gateway Usage - Monthly usage', then click the [Select] button
7. Under the 'Display As' section, click on 'Vertical Bar Chart'
8. Click the [Add] button
9. Click the [Save] button
10. Click the [Done] button to exit the Dashboard editor

Chargent Cases Package Version

Due to a packaging error, the Chargent Cases package remains at version 6.30. This issue has been raised to Salesforce, and will be resolved in an upcoming release.