



Chargent Release Notes

Chargent version 6.55

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Release Details

Release Title

Chargent version 6.55

Release Installation URL

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

Release Overview

The Chargent application allows users to configure precise recurring payment schedules, leveraging a large list of frequency and stop-rule options. If you can imagine a recurring payment scenario, the Chargent app can schedule it right in Salesforce with just a few clicks.

But there's another important aspect of recurring payment schedules to consider - communicating them! How easy is it for your staff to look up this info? More importantly, how easy is it for **your customers** to do the same when logged into your Community or Portal? In our view, it's not easy enough. The Recurring Billing section of the Chargent Order object is useful for configuring or tweaking these details, but not for consuming that information. We can do better, and we have in Chargent version 6.55. Introducing our Payment Status Viewer component!

With our new Payment Status Viewer component, Salesforce users and their customers are presented with the details of their payment schedule in a quick, easy-to-understand format. Read more about it in the New Features section of these release notes.

Chargent v6.55 also delivers the following updates to the Chargent application:

- Application enhancements and fixes
- Full testing and compatibility with Salesforce's Summer '22 release
- Chargent Batch Refund Tool - tested and confirmed compatible with Chargent Base and Orders version 6.55

New Features

Payment Status Viewer Component

Where: This component can be used with Chargent Base and Orders v6.55 and higher. This can be added to any lightning page, including in Communities, or within a Screen Flow

This new component can be configured on the Chargent Order object, or any Lightning page in order to intuitively display the payment status and recurring payment configuration of a Chargent Order record. It works in Salesforce Communities and other Experience Cloud pages, as well as in Salesforce Screen Flows.

Gone are the days of scrolling through a record and viewing multiple fields in order to understand the schedule and setup of your customer payments. This component displays that info clearly and above the fold, saving you time when working with customers.

You can drag this component onto a Salesforce Community page in mere seconds to make your customers' lives easier. They see when they pay, and how much in a clear, lightweight component.

Batch Refund Tool v1.14

Where: This tool is a separate package that can be installed to work with the Chargent Base and Orders packages. Please contact Chargent Customer Support in order to install this package.

The Chargent Batch Refund tool allows users to execute refunds against a specified list of previously charged / captured Chargent transactions. This *low-code* solution can be used in Salesforce Lightning or Classic UI, and is the quickest way to complete batch refunds without committing developer time or custom code.

Using a SOQL WHERE clause, users can specify the exact list of Chargent Transaction records to target for refunds. Simply enter your query, verify it, and you're ready to go. With the press of a button, this tool will then execute a refund transaction against each charged / captured transaction targeted. The operation result will be presented in the 'Last Completed Job Status' table on the same page.

Enhancements

Adyen Credential Field Name - Updated

Updated the credential field label “Merchant Account” to “Account” in our Gateway Setup Wizard in order to exactly match this credential field name within the Adyen cabinet.

Payment Request Error Messaging - Updated

Updated the Payment Request feature so that error messages pertaining to invalid or missing email addresses surfaced within the pop-up modal instead of on the underlying record page.

Take Payment Component - “Name on Account” Field - Updated

Updated our Take Payment Component to allow users to configure visibility for the “Name on Account” field. This new configuration option applies to uses of the Take Payment Component in Communities, Flows, and other Lightning pages.

Payment Console - Balance Due Amount - Updated

Updated our Payment Console to include a “Balance Due” field to be used during the setup of recurring payment schedules that use the Balance Due stop rule.

Salesforce Summer ‘22 Release - Tested

This version has been tested for compatibility with Salesforce’s Summer ‘22 release.

Fixes

Lyons Credentials “SObject” Error - Fixed

Fixed an issue wherein users configuring their Lyons account in the Gateway Setup Wizard would receive an “SObject” error, preventing the completion of gateway setup.

Payment Console and Cybersource SCA Error “478” - Fixed

Fixed an issue wherein SCA errors (including “478”) would surface for some payments initiated through the Payment Console using the Cybersource payment gateway.

USAePay: “Unexpected character” error - Fixed

Fixed an issue wherein executing the TChargentBatchUpdateACH batch could result in an error for transactions using the USAePay payment gateway.

Canadian EFT Transactions - Character Limit Errors - Fixed

Fixed an issue wherein minimum character limit errors for the routing number field could surface during Canadian EFT transactions.

Take Payment Component - Billing Company & Billing Tax Field Issues - Fixed

Fixed an issue wherein the Billing Company and Billing Tax fields on a Chargent Order record could be cleared if no values were entered into those respective fields on the Take Payment component during a transaction.

Automated Collections - Customers in Collections Report Issue - Fixed

Fixed an issue wherein the Customers in Collections Report would not display the Last Stage Executed value properly.

Automated Collections - Chargent Order Payment Status Issue - Fixed

Fixed an issue wherein the Payment Status field would be set to Recurring instead of Completed when Automated Collections collected a payment for Chargent Order records with Payment Frequencies of Once.

Automated Collections - Configuration Page Refresh Issue - Fixed

Fixed an issue wherein deleting a stage during the creation or editing of an Automated Collections process would refresh the page.

Chargent Anywhere - Add Check Field - Check Number Issue - Fixed

Fixed an issue wherein the Check Number field in the Add Check feature of Chargent Anywhere would only accept numbers.

Adyen Authentication / Currency Issue - Fixed

Fixed an issue wherein authentication errors would surface within the Gateway Setup Wizard if the default currency was anything other than USD.

Legacy Profiles - Cases and SFA Packages - Removed

Removed unused Admin and User profiles relating to our Cases and SFA packages. Permission Set assignment is now handled within Chargent Settings, or within standard Salesforce setup.

Additional Upgrade Steps

We recommend that users upgrading from previous versions of Chargent remove the now-deprecated 'Next Transaction Date' field, and add the Payment Status Viewer Component to their Chargent Order page layout. For new installs, this step will not be necessary.

Removing 'Next Transaction Date'

Navigate to Setup > Object Manager > Chargent Order > Page Layouts > Order Layout and drag the 'Next Transaction Date' field off of the layout.

Click the [Save] button at the top of the palette.

Adding the Payment Status Viewer Component

Navigate to a Chargent Order Record page, click the gear icon near the top-right portion of the page, then click 'Edit Page.' From there, scroll to the 'Custom - Managed' section of the Components list on the left, then click and drag the Payment Status Viewer Component to the page. We recommend the top of the right-side column.

Click the [Save] button at the top-right portion of the page, then the [Activate] button if prompted. Assign this page configuration as the 'Org Default' if you wish.

Known Issues

Batch Refund Tool - Page Refresh

Upon clicking the [Start] button to initiate the batch refund process, the page may update to "Current Progress: Holding" and display a status indicator that doesn't appear to progress.

Workaround

If this occurs, refresh the page after a couple of minutes to view the Last Completed Job Status table. This will provide a list of all transactions targeted as well as their refund status. If the batch size is large, you may need to refresh this page after a longer waiting period in order to view all results.