Chargent Quick Start Guide

Follow these simple installation steps to install and configure Chargent and begin your 30-day free trial.

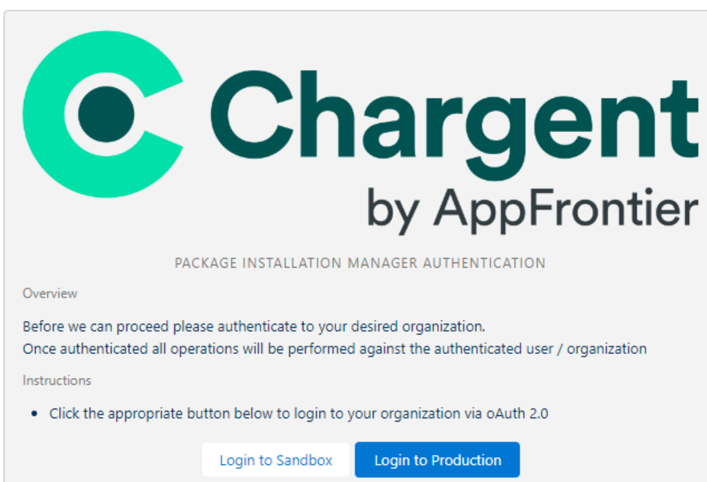
For more detailed information on any of the steps in this guide, please see our complete support documentation or search our knowledge base.

Ready to get started? Here we go!

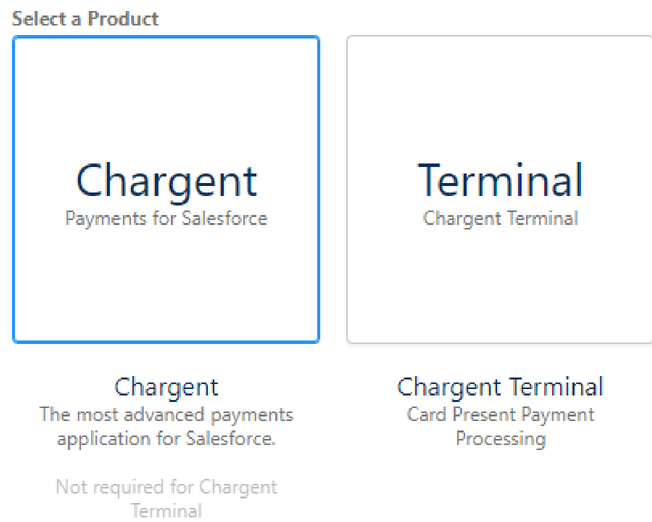
1 Install all 3 Chargent Packages

First, install all 3 Chargent packages into your Production or Sandbox Org, including the Chargent Base, Chargent Transaction, and Chargent Anywhere packages. Fortunately, installation is made easy using the Package Installation Manager (PIM)! We always recommend installing in a Sandbox before installing in a Production environment.

You can access the PIM to install or update Chargent on our website's installation page. From the installation page, click **Update Chargent** (This will also install Chargent). You will be instructed to log in to your Salesforce Sandbox or Production org. Click **Allow** to grant access and install Chargent.

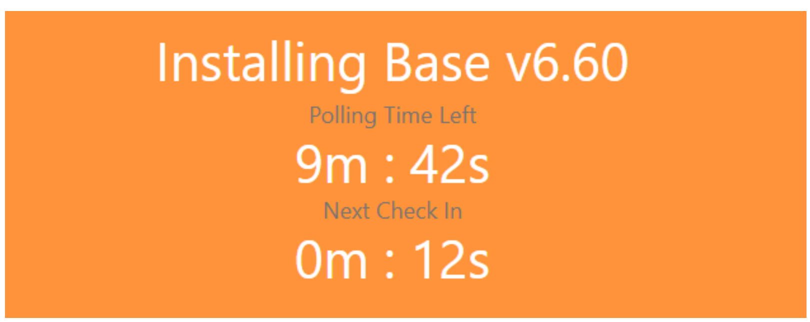


Click **Chargent - Payments for Salesforce** to automatically install the Chargent Base, Chargent Transactions, and Chargent Anywhere packages.



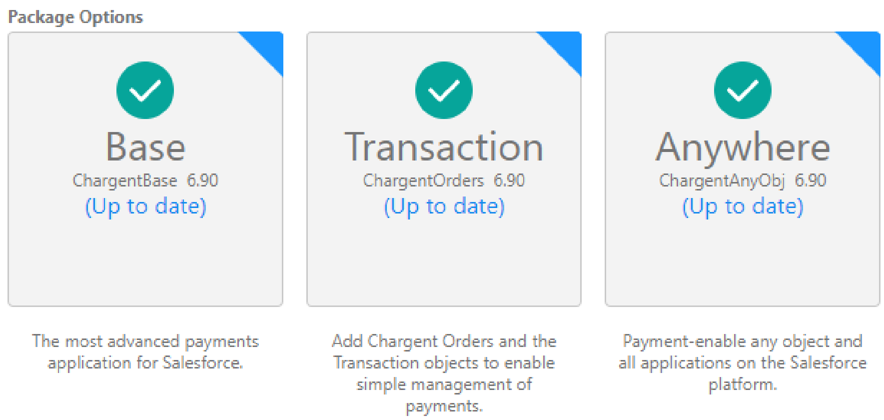
Note: You don't need to install Chargent Terminal unless you have a physical Chargent Terminal POS system. If you have a physical Chargent Terminal, see the [Chargent Terminal Configuration Guide].

You will see the following screen during the installation of all three packages.



It will take a few minutes to complete the installation. We recommend that you refrain from navigating away from the PIM webpage during installation. Some browsers include a memory mode that may interrupt your installation.

Once you have installed all three packages, you will see the Base, Transaction, and Anywhere package options checked with a checkmark, indicating that they have been installed and are up to date.



Problems with the installation? Find standard solutions here or search our extensive knowledge base for answers.

Please don't hesitate to contact us with any questions.

2 License Assignment (Production Only)

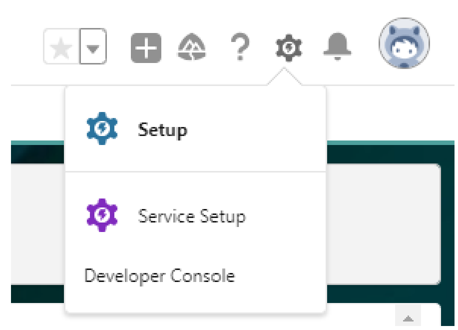
After installation, assign Chargent licenses to each user. Our base pricing package includes 20 users, but you can purchase additional licenses as needed. The Chargent Transaction and Chargent Anywhere packages both require a license. The Chargent Base package does not require a license.

Note: You do not need to assign licenses in a Sandbox, allowing you to test all of Chargent's features without the need to assign and manage your licenses.

Users not assigned a Chargent license cannot access Chargent objects, fields, tabs, or data and cannot use any of Chargent's features.

To assign licenses, follow these steps:

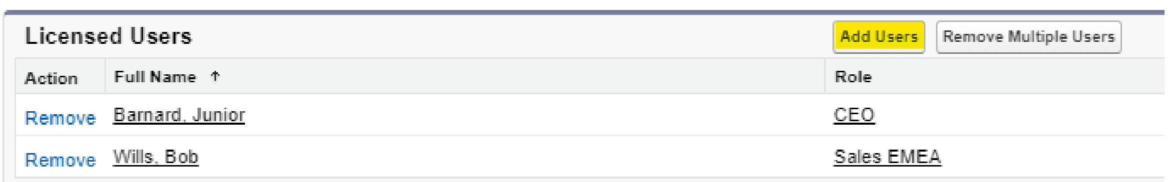
1. Log in to your Salesforce.com account.
2. Click on the Gear Icon and click **Setup.**



3. In the Quick Find box, search for and click **Installed Packages**.
4. Click **Manage Licenses** to the left of Chargent Orders, as shown below.

Note: If you do not see a Manage Licenses link, you may be in a sandbox environment or looking at the Chargent Base package.

5. Click **Add Users** and select the checkbox next to all users requiring access to Chargent.



6. Click **Add**.
7. Repeat steps 4-6 for the Chargent Anywhere package.

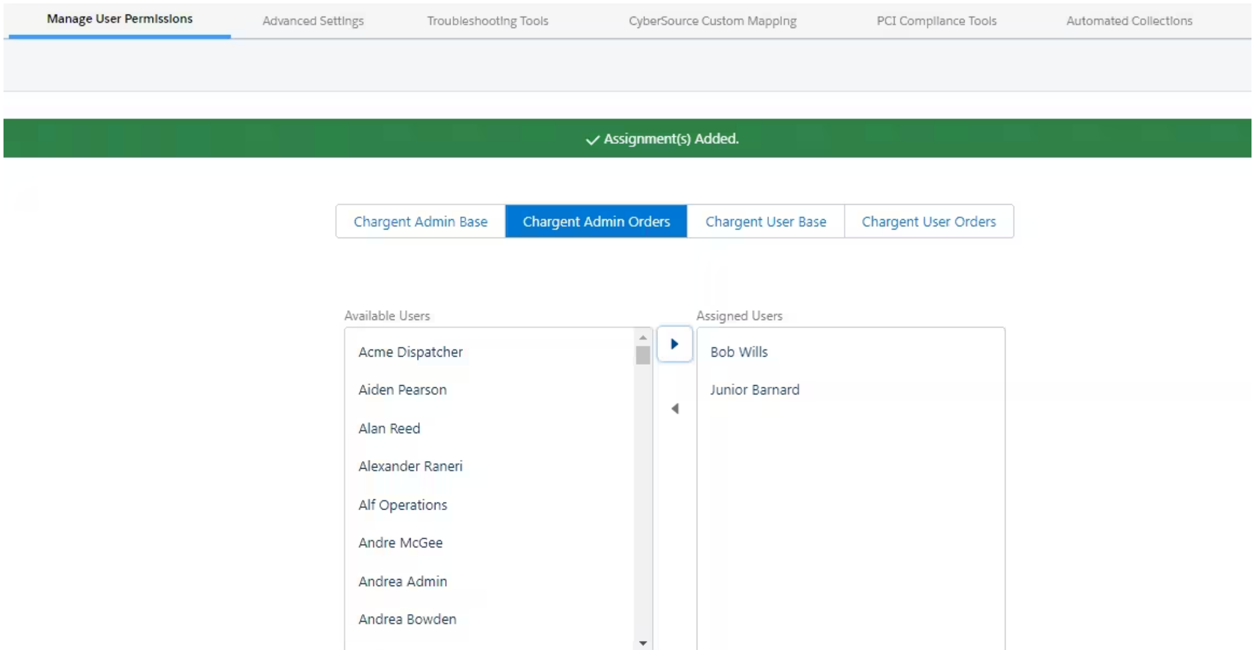
3 Add Permission Sets to Admins & Users

To view, create, and update records in Chargent, you must assign Permissions to your users. Our Permission Set Assignment Tool makes this easy once you have installed Chargent and assigned licenses.

1. Use the App Launcher and click the **Chargent** app.
2. Click the **Chargent Settings** tab.
3. Click the **Manage User Permissions** subtab.

Depending on the required access level, you will assign two Permission Sets to every user who needs access to Chargent.

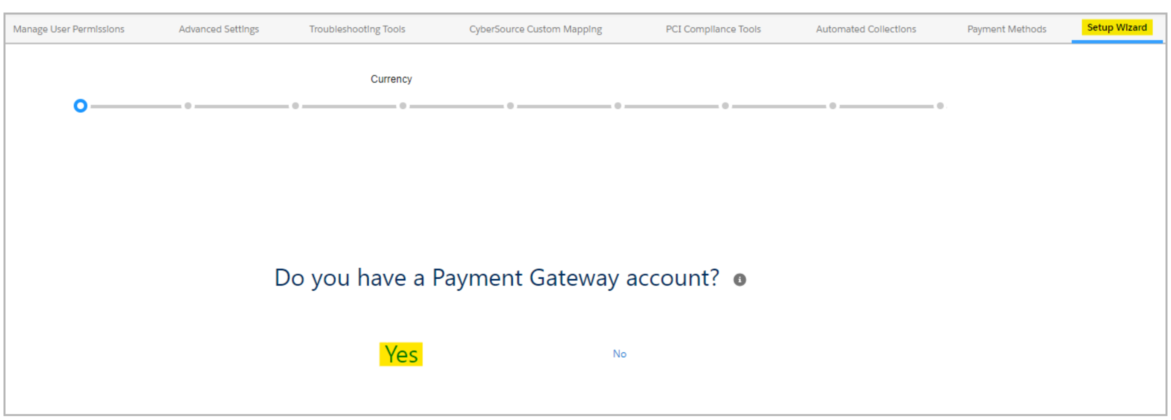
- Chargent Admins: `Chargent Admin Base` and `Chargent Admin Orders`.
- All Other Users: `Chargent User Base` and `Chargent User Orders`.



4 Choose a Gateway

After assigning licenses (Production Only) and permissions to your users, the next step is configuring your payment gateway. If you're unsure what payment gateway to use, please contact us; we can help you determine which gateway will best suit your needs.

1. Use the App Launcher and click the **Chargent** app.
2. Click the **Chargent Settings** tab.
3. Click the **Setup Wizard** subtab.
4. When prompted, "Do you have a Payment Gateway account?" click **Yes**.



5. Select your Payment Gateway from the list.
6. Add your credentials, ensuring you choose the Test Transactions or Live Transactions tab based on your gateway account type (Test or Live).
    - For more information, visit Testing Chargent.

Check out our Payment Gateway Guides for information and instructions specific to your gateway.

You will also need to answer the following questions:

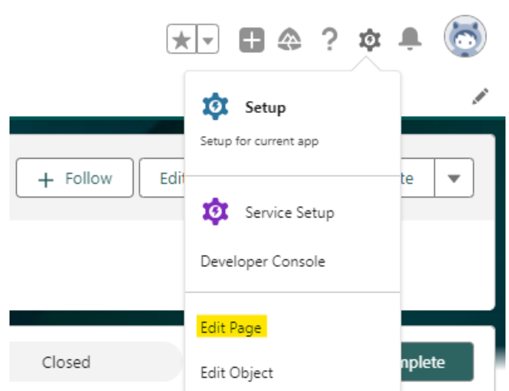
- Will you use tokenization? (recommended)
- What currency will you be using? (USD, CAD, etc.)
- What payment methods will you be accepting?
    - Credit cards and/or ACH (electronic check)?
    - What credit Card types will you be accepting? (Visa, Mastercard, etc.)
- Payment Console Setup (exclusive to Platform Edition or higher)
    - Show Charge Button
    - Show / Create Update Token Button
    - Show Authorize Button
- Will you be using Recurring Billing?
    - If yes, do you want it to run the batch at 3 am daily (recommended) or a different time?

5 Set Up Chargent Anywhere

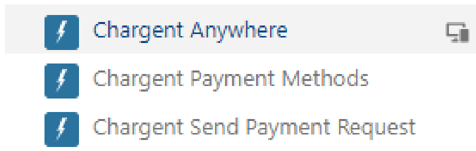
Chargent Anywhere allows you to process payments from any object in Salesforce. You must add the Chargent Anywhere component to the object you wish to process payments from. We also recommend adding the component to the Chargent Orders object.

To set up Chargent Anywhere, follow these steps:

1. Navigate to a record of the object you wish to add Chargent Anywhere.
2. Click the Gear Icon and click **Edit Page**.



3. On the left, under Components, scroll down and find the Chargent Anywhere Component under Managed Components.
4. Drag the component to the desired position on the page. We recommend placing it at the top for easy access.

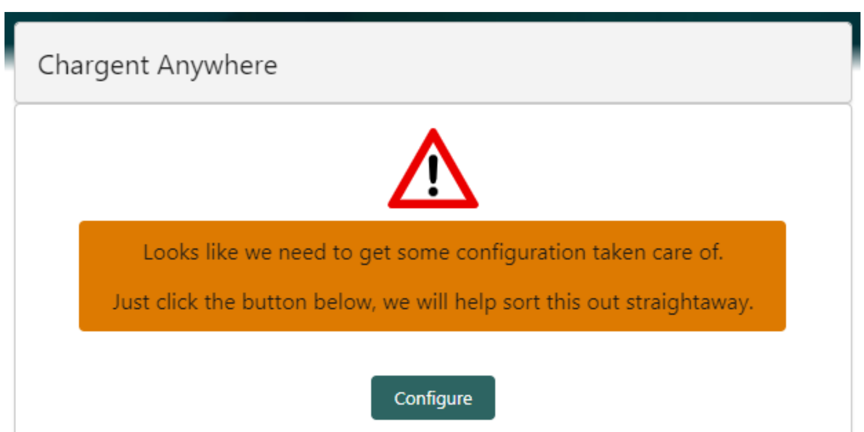


For details about the Chargent Anywhere component's configuration fields, please refer to Customizing Chargent Anywhere.

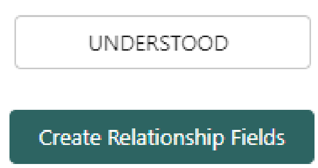
5. Click **Save** and **Activate** the Page.

The final step is to complete the configuration, which creates the required lookup fields.

1. Navigate to a record of the object you added Chargent Anywhere.
2. Click **Configure** in Chargent Anywhere to launch the Chargent Anywhere Configuration Wizard.



3. Once you have read the details and are ready to proceed, type `UNDERSTOOD` (case sensitive) and click **Create Relationship Fields.**



Note: The Chargent Anywhere component requires four fields to work correctly. The following fields can be existing or custom fields:

- Charge Amount (Currency)
- Recurring Amount (Currency)
- Billing Account (Lookup)
- Billing Contact (Lookup)

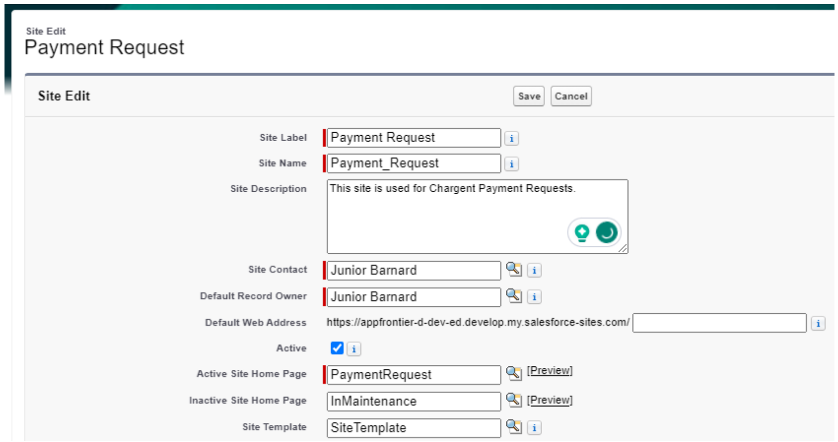
**Fields are referenced with their API Name.*

The basic setup is now complete! Navigate to a record on the configured object, and you'll see the Chargent Anywhere component in your chosen location on the record page. You're ready to collect a one-time payment, set up a recurring payment, or send a Payment Request.

6 Set Up Payment Request

Before setting up the Payment Request feature, ensure a Salesforce Site is created and configured by following these steps:

1. Click the Gear Icon and click **Setup.**
2. In Quick Find, search for and click **Sites.**
3. Click **New** to create a new Site.
4. Site Label: `Payment Request`
5. Site Name: `Payment_Request`
6. Clickjack Protection Level: Use the default or check with your IT department
7. Active Site Home Page: `PaymentRequest`
8. Active: `Checked`
9. Require Secure Connections (HTTPS): `Checked`
10. Click **Save**



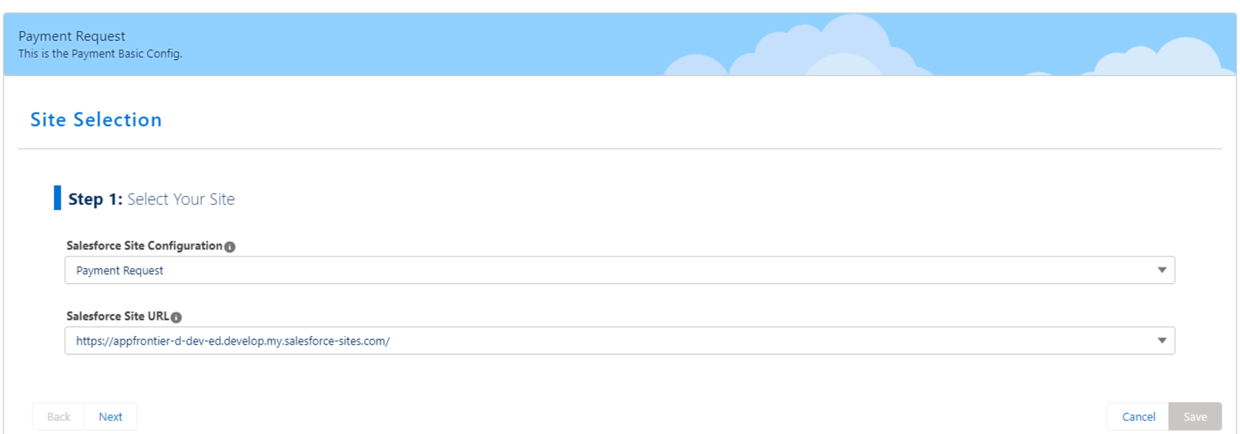
After creating your Site, you must create a Payment Request Template via the Payment Request Setup Wizard:

1. Use the App Launcher and click the **Chargent** app.
2. Click the **Chargent Settings** tab.
3. Click the **Payment Request Setup** subtab.
4. In the left sidebar, click **New** to create a Payment Request Template.
5. Click the new template and follow the steps in the Payment Request Setup Wizard.

Site Selection

Step 1: Select Your Site

The Site Selection page will automatically populate an existing Salesforce Site or let you know that you must create one before configuring Chargent's Payment Request.

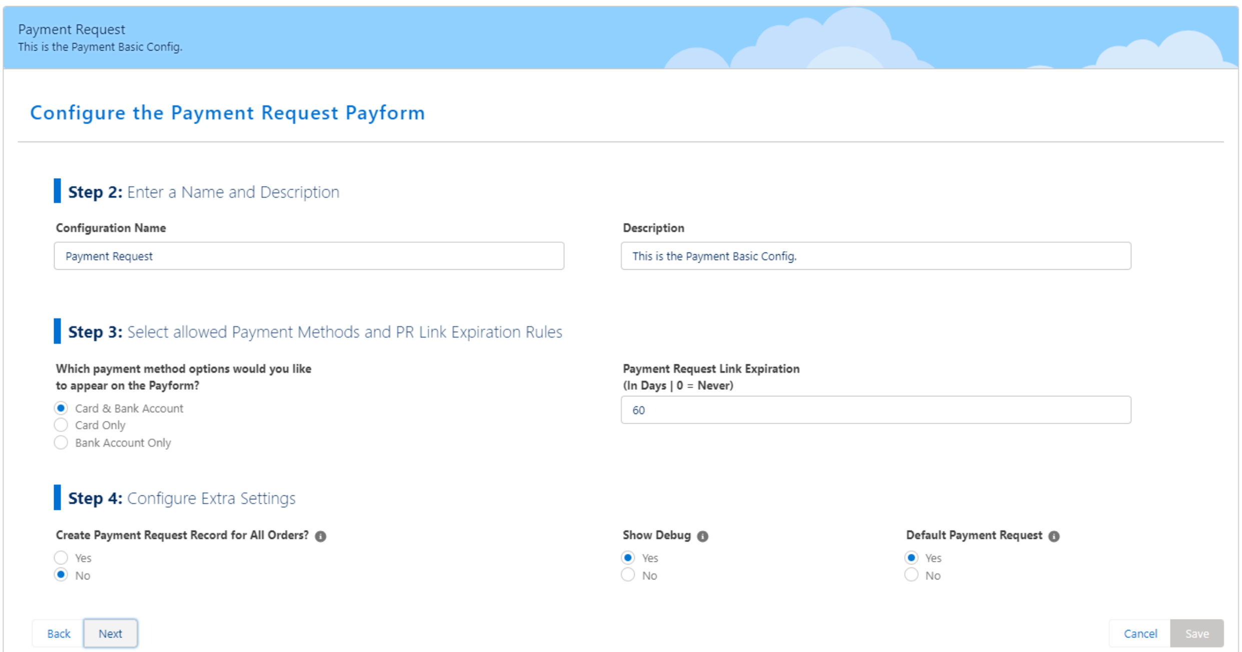


Configure the Payment Request Payform

The configuration page will allow you to name your Template. If this is your first time setting up Payment Requests, the page will populate the fields with our recommended settings.

Step 2: Enter a Name and Description

Give the Payment Request Template a name. If you have multiple Payment Request forms, the name should help you identify the correct template when you select it later.



Step 3: Select allowed Payment Methods and PR Link Expiration Rules

Which payment methods will you be accepting? Card and Bank Account, Card Only, or Bank Account only. You can also set the days before a Payment Request link expires.

Step 4: Configure Extra Settings

- **Create Payment Request Record for All Orders?** – Only select `Yes` to create a Payment Request record for every Chargent Order record created. Most customers should select `No`.
- **Show Debug** – Only select `Yes` if you are testing and require details about requests and responses sent to your Payment Gateway for all Payment Requests. Show Debug should be set to `No` if you are processing live transactions.
- **Default Payment Request** – Select `Yes` if you want this Payment Request Template to be the default payform. You can only have one default payform.

Customize Payment Request Page

Step 5: Edit your Welcome Text
Your welcome text should be friendly towards the customer and ask them to enter the billing information in your Payform.

Step 6: Edit your Payment Messages
Customize your Success, Cancel, and Fail Pages to let customers know the payment they used was processed as expected, declined, or canceled. You can also edit the footer of your Payform.

Developer Pages
You should only use Developer Pages if you are a Salesforce Developer using custom Visualforce Pages.

Change Look & Feel

Step 7: Upload your Company Logo
Upload your company logo by clicking **Upload Files** or drag and drop your image. Make sure your logo is the actual size before uploading.

Step 8: Edit Your Tabs Names
Your Payform has two sections — one for the Billing Address and another for the Credit Card details. Here you can edit the titles of each section to fit your company's branding.

Step 9: Edit Your Payform Button
The default button name is Charge, but you can change the button to say `Donate` or `Process Payment`. You can also change the button's color to fit your company's branding.

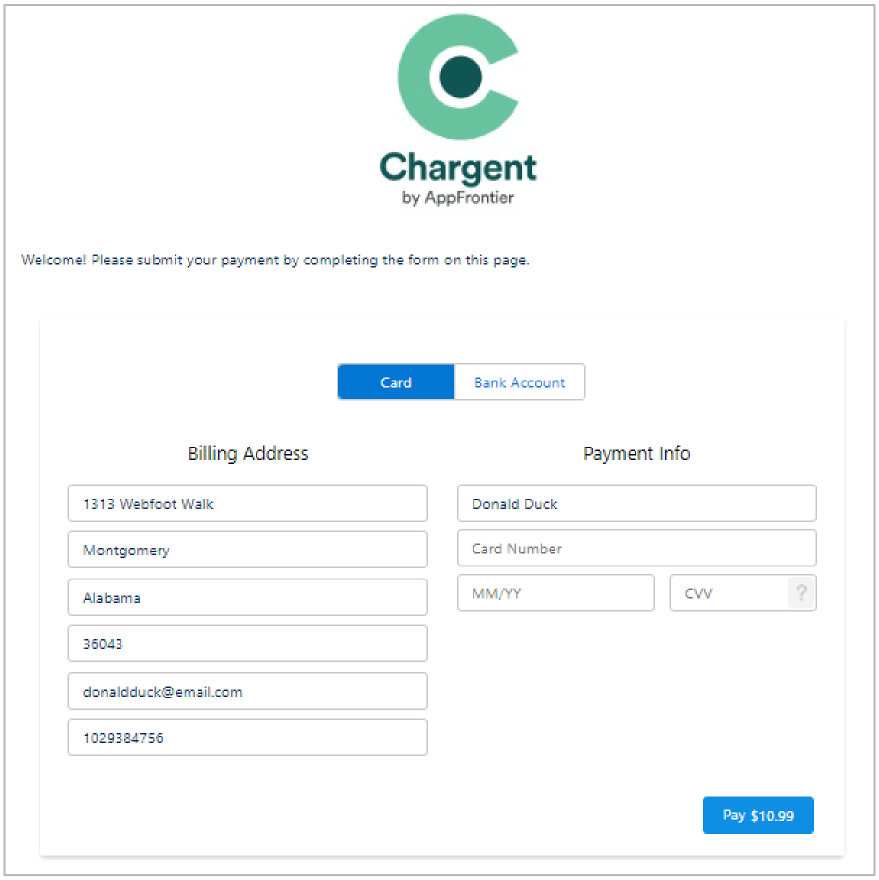
Step 10: Select a Background
You will need to complete a few steps to change your background image.

1. Upload your background image as a Public Static Resource in Salesforce.
2. Copy the image's URL.
3. Check Enable Custom Background in the Payment Request Setup.
4. Paste the URL for the Public Static Resource into the blank field.

Step 11: Choose your Payform Location
Payform Location aligns your form to the Left, Center, or Right.

Preview and Save your Payment Request

Preview and Save your Payment Request. Click **Preview** to see what your Payment Request form will look like. When you are happy with your Payment Request, click **Save**. After saving the form, you can always return to the Payment Request Wizard and make changes.



7 Explore Chargent Settings

You can find Chargent's settings by clicking the **Chargent Settings** tab in the **Chargent App**.

Here, you will find links to our complete help documentation, access to advanced settings for Chargent, feature activation, and more. Take some time to explore each of the Chargent Settings tabs.

8 Testing Chargent

Always test your configuration in your Sandbox before deploying your app to production. At a minimum, we recommend that your testing includes the following:

- **Test in a Sandbox using Test Credit Cards** – Most payment gateways provide the ability to create developer and test accounts.
- **Test in a Sandbox using Live Credit Cards** – After completing basic testing with a test account, we recommend testing several live transactions before migrating to production with Chargent.
- **Test in Production using Live Credit Cards** – As a final step in the testing process, ensure that everything works correctly in your production environment using live transactions.

Note: Remember to test again after making any updates or developing custom solutions related to Chargent.

If you have Chargent Platform or Enterprise Edition, you can quickly test your configuration using the Chargent Payment Console. If you are on Sites Edition, you can test using the Charge action on the Chargent Order record. You should always test the standard charge feature before testing an advanced feature like Payment Request.

For more details, please read our extensive testing documentation.

Next Steps

Chargent offers many additional features, including Recurring Billing and Payment Console. Please refer to our complete documentation for additional setup instructions, tips, and best practices.

Our Support Team is always happy to help with any questions or concerns.

Thank you for supporting Chargent. We look forward to helping you take payments everywhere in Salesforce!

If you love Chargent as much as we do, we always appreciate a review on the AppExchange.