

Chargent Quick Start Guide

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

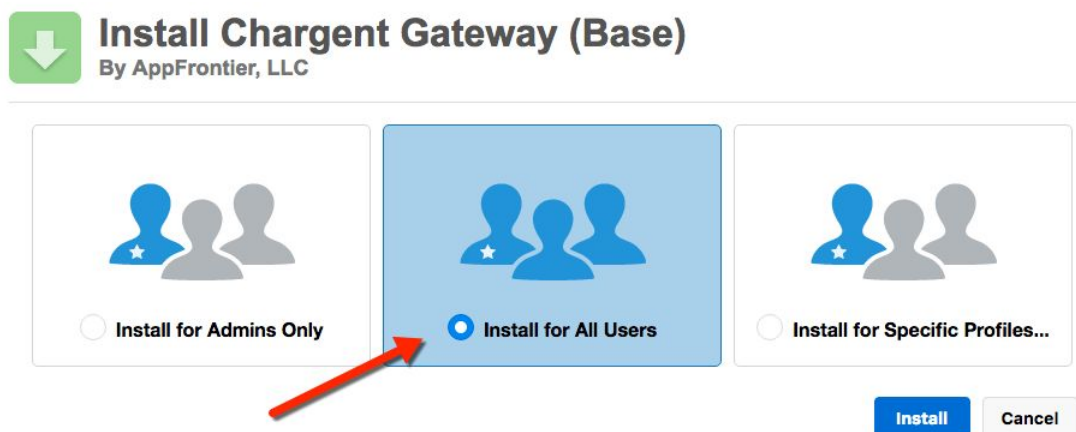
For more detailed information on any of the steps in this guide, please see our complete [support documentation](#) or search our [knowledge base](#).

Ready to Install? Here we go.

1 Install the Chargent Gateway (Base) Package

First, you'll need to install the Chargent Gateway package, either into your [production](#) or [sandbox](#) environment on Salesforce.com.

We strongly recommend that you choose the option to **Install for All Users**, since no functionality is accessible without a Chargent license assigned to a user. Granting access to Chargent features to specific profiles manually can be difficult.



Next, agree to allow Chargent to communicate with the various 3rd-party gateways by checking the **Yes** box in the pop-up window and clicking **Continue**.

secure.authorize.net	<input checked="" type="checkbox"/>
secure.networkmerchants.com	<input checked="" type="checkbox"/>
secure.platumpaygateway.com	<input checked="" type="checkbox"/>
test.authorize.net	<input checked="" type="checkbox"/>
test.linked2pay.com	<input type="checkbox"/>
transact.litle.com	<input checked="" type="checkbox"/>
webservices.optimalpayments.com	<input checked="" type="checkbox"/>
webservices.test.optimalpayments.com	<input checked="" type="checkbox"/>

1 Yes, grant access to these third-party web sites

2

Don't See the Checkbox? Use the scroll bar on the right side of the window to scroll to the bottom of the list.

It will take a few moments to complete the installation of the Chargent Gateway package. You may receive a message that the installation is taking longer than usual. When the installation is complete, you'll receive an email message and the confirmation page will appear.

Click **Done** to continue to the **Installed Packages** page, on which you can now see the installed Chargent Gateway package:

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

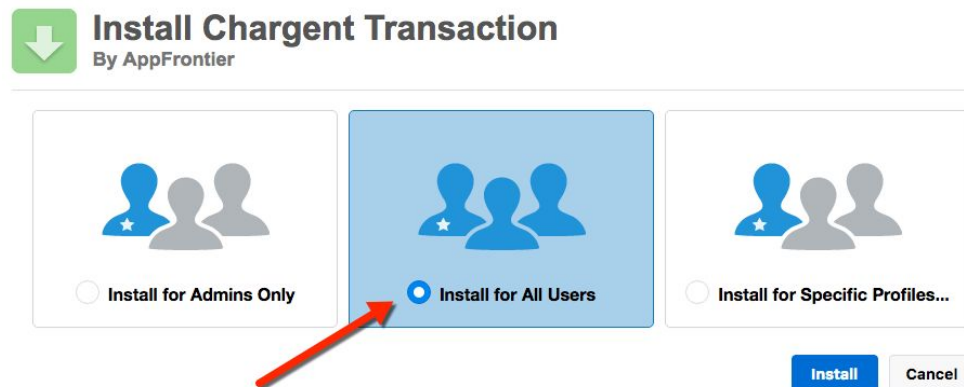
Installed Packages			
Action	Package Name	Publisher	Version
Uninstall Configure	Chargent Gateway (Base)	AppFrontier, LLC	4
Description The Chargent Gateway Package (Chargent Base) consists of: <ul style="list-style-type: none">- Chargent Application and Logo- Gateway Object (Custom)- Gateway Data Class- Payme...			

Uninstalled Packages
No uninstalled package data archives

2 Install the Chargent Transaction Package

Now, go Step 2 on the [installation page](#) to install the Chargent Orders Transaction package.

Click either the production or sandbox link to display the installation options page. As with the Chargent Gateway package, we recommend that you choose the option to **Install for All Users**:



That's it! As with the Chargent Gateway package, you'll receive an email message and the confirmation page will appear to indicate that the transaction package installation is complete.

Installation Support

Problems with the installation? [Find common solutions here.](#)

Please don't hesitate to [contact us](#) at any time, if you have any questions or feedback during the trial period. We hope that you enjoy Chargent!

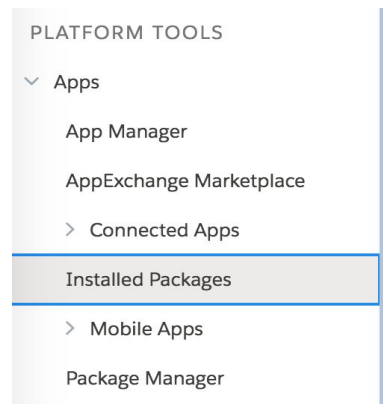
3 License Assignment (Production Only)

Immediately after installation, we recommend that you assign Chargent licenses to each of your users. Our standard installation is 10 users, but you can purchase additional licenses.

Licenses not assignable in a sandbox: If you are installing into a sandbox, there is no feature for assigning licenses to users. In a sandbox, you can use and test all of the Chargent features and skip this step.

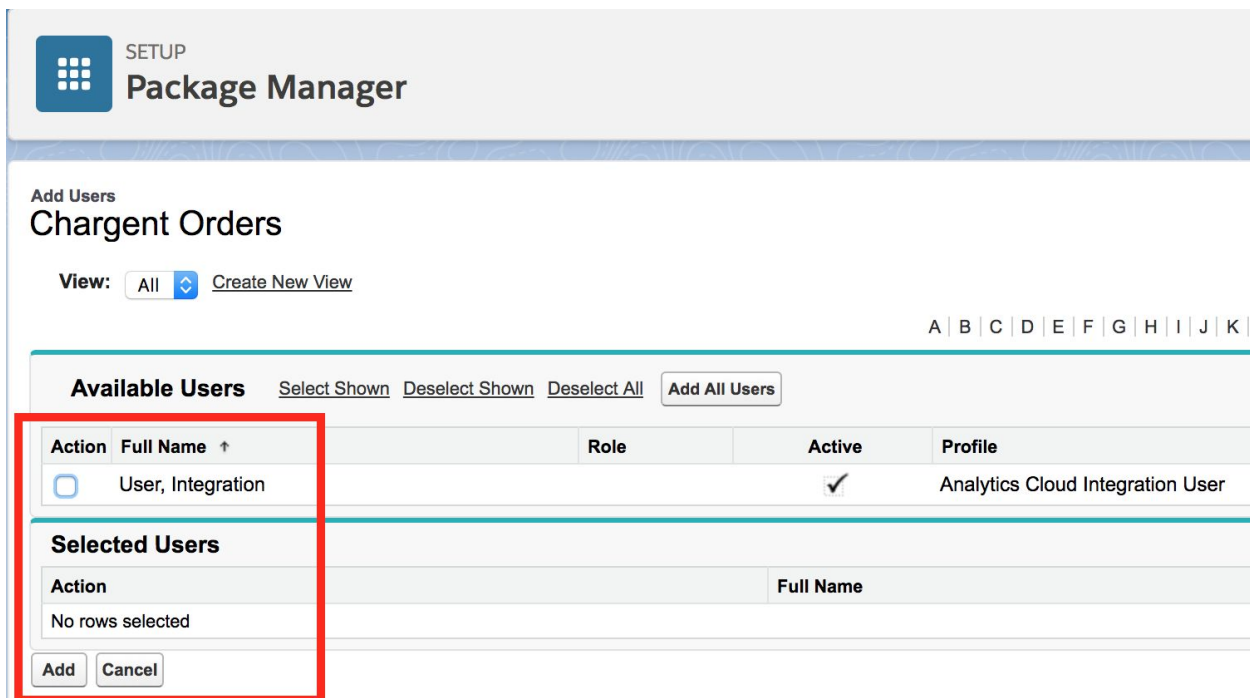
Users that have not been assigned a Chargent license will be unable to access Chargent objects, fields, tabs or data and will not be able to use any of Chargent's features. To assign licenses, follow these steps:

1. Login to your Salesforce.com account
2. Click on the **Setup** link which is either
 - a. In Lightning click the gear icon on the top right.
 - b. In Classick either in the upper-right corner.
 - c. Or In the submenu accessed by clicking on your name in the upper-right corner
3. Scroll down to find the link on the left-hand menu under **Build** and click **Installed Packages**.
4. Click on the Manage Licenses link beside **Chargent Orders** (or **Chargent Transaction (Opportunities)** or **Chargent Cases** if you have one of those packages installed) as shown below.





Manage Licenses button disabled? If you do not see a **Manage Licenses** link, it may be that you are in a sandbox environment or are looking at the Chargent Gateway package.



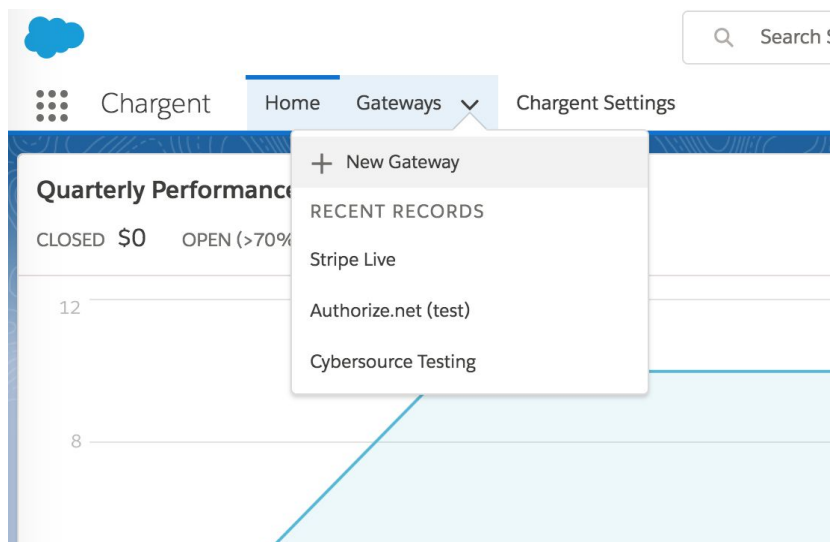
On the Licensed Users page, you can add and remove users as shown in the figure below. See our documentation to learn about the details of [license management](#).

4 Choose a gateway

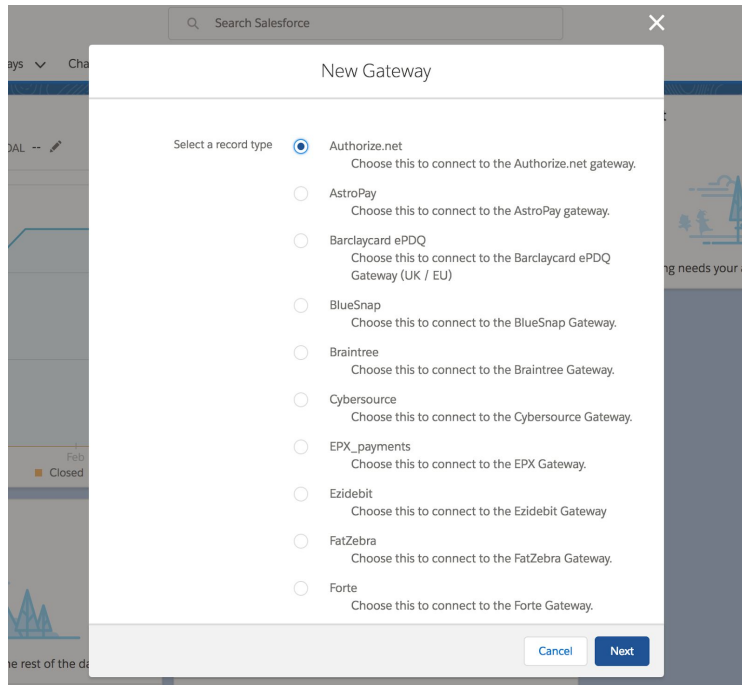
After installing the Chargent Gateway package, the Chargent Orders Transaction package, and assigning licenses to your users, the next step is configuring your payment gateway.

In the upper left side of the Salesforce menu click on the grid icon. Select the option for Chargent (note: the options can be dragged to different positions). In the upper-right Salesforce menu, switch to the Chargent application (see the figure).

Next, select New Gateway from the dropdown menu for the Gateway tab.



Select the Payment Gateway to use and click Next.



4. On the Gateway page, you'll need to complete the appropriate settings and click Save.

Below are specific pages that guide you through the setup and testing of each payment gateway with Chargent. Just click on the link below that corresponds to your gateway.

Payment Gateway Specific Documentation

- [AstroPay](#)
- [Authorize.net](#)
- [AvidiaPay / linked2pay](#)
- [Barclaycard ePDQ](#)
- [BluePay](#)
- [BlueSnap](#)
- [Braintree](#)
- [Chase Orbital](#)
- [Cybersource](#)
- [Merchant e-Solutions](#)
- [Merchant Warrior](#)
- [ModusLink](#)
- [Moneris](#)
- [NMI](#)
- [PayPal Payflow Pro](#)
- [Paysafe](#) (formerly Optimal Netbanx)
- [PayU Latam](#)
- [Realex Payments](#)

- [eProcessing Network](#)
- [eWAY](#)
- [Ezidebit](#)
- [Fat Zebra](#)
- [Forte](#)
- [iATS Payments](#)
- [SecureCo](#)
- [Stripe](#)
- [USAePay](#)
- [Vantiv \(Litle\)](#)

If your Payment Gateway isn't listed above then look at our gateway integrations that use the Authorize.net emulator. See our complete list [here](#) and enter your endpoint override to match your gateway URL.

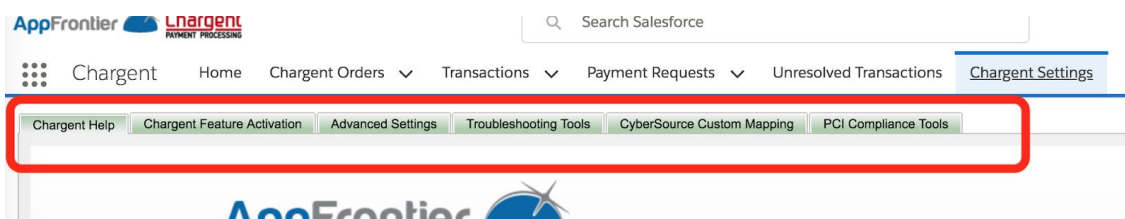
5 Chargent Settings

Click on the Chargent Settings option in the Salesforce menu.

Here, you will find links to our complete help documentation, access to Chargent configuration custom settings for Chargent, and more.

Take time to explore each of Chargent Settings tabs, as we depict in the figure below:

- Chargent Help
- Chargent Feature Activation
- Advanced Settings
- Troubleshooting Tools



Charges and Transactions

With Chargent, we use industry-standard terminology for online credit card and electronic check processing. If you're already using an online payment gateway, then you're probably familiar with these concepts: *authorize*, *charge*, *void*, and *credit*. As you can see in our [help documentation](#), we employ the same definitions as the payment gateways.

For additional information, please refer to the administration guide for your payment gateway.

6 Mandatory fields for payment processing

To process a credit card transaction, a payment gateway will require a that you populate a minimum set of fields. This varies somewhat among the gateway providers. Chargent does not specify any mandatory fields, but we recommend that you ensure that these fields always contain valid data:

Credit Card and Bank Transfers

- Billing First Name and Last Name
- Billing Address
- Billing Zipcode
- Payment Method (Credit Card or Check)

Credit Card Payments

- Card Type (Visa, Mastercard, Amex or Discover)
- Token (or Card Number)
- Card Expiration Month (2 digits - MM)
- Card Expiration Year (4 digits - YYYY)

Bank Transfers These fields are necessary for ACH / eCheck transactions:

- Bank Account Type (Checking, Savings or Business Checking)
- Bank Account Number
- Bank Routing Number
- Bank Account Name (person or company name on bank account)
- Bank Name (name of the financial institution)

In our help docs, we also provide a list of the [optional and informational fields](#).

7 Testing Chargent

We strongly recommend that you test your configuration before deploying your app to production.

We recommend, at a minimum, that your testing includes: plan for time to implement the following:

- **Developer / Sandbox accounts** — an environment for submitting test transactions. Most payment gateways provide the ability to create developer and test accounts.
- **Progressive testing** — After completing basic testing with a test account, we also recommend that you test several real, live transactions before migrating to production with Chargent.
- **Migrating from a sandbox to production** — before moving to production, we recommend that you test any Salesforce and Chargent configurations in a Salesforce sandbox. Testing is critically important for any upgrade or configuration change.

Re-testing: Remember to re-test after making any update once you have gone live with Chargent.

For more details, please read our extensive [testing documentation](#).

Next Steps

To set up recurring billing, or premium features such as Payment Request or Payment Console, please refer to our [complete documentation](#).