

Chargent Quick Start Guide

Follow the simple installation steps in this quick-start guide to begin your 30-day trial with Chargent.

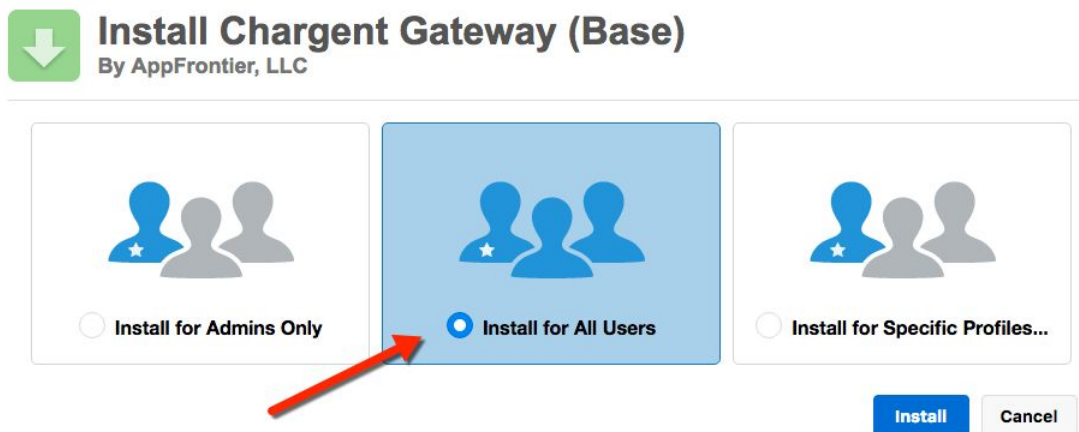
For more detailed information on any of these steps, please see our complete [support documentation](#) or search our [knowledge base](#).

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 recommend that you choose the option to **Install for All Users**, since it's easier to restrict permissions later—if necessary.



Next, agree to permit access to 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.platinumpaygateway.com	<input checked="" type="checkbox"/>
test.authorize.net	<input checked="" type="checkbox"/>
test.linked2pay.com	<input type="checkbox"/>
transact.little.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 gateway extension. 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 Chargent Gateway:

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, it's time to add a transaction package. It's possible to install only one Chargent transaction package, which corresponds to the part of Salesforce in which you want see the billing and transaction fields.

Unsure Which Package? We recommend the Chargent Orders transaction package for maximum flexibility. To have the billing function embedded directly in Opportunities or Cases, choose one of those packages. [See our FAQ](#) for more information.

To install one of these packages, go Step 2 on the [installation page](#) and click ONLY ONE of the transaction package links, as shown in the figure below:

Step 2

Install Chargent Transaction Package

Use ONE link below to choose the part of Salesforce where you want the Chargent billing and transaction fields - Opportunities, Cases or Chargent Orders (Custom object).

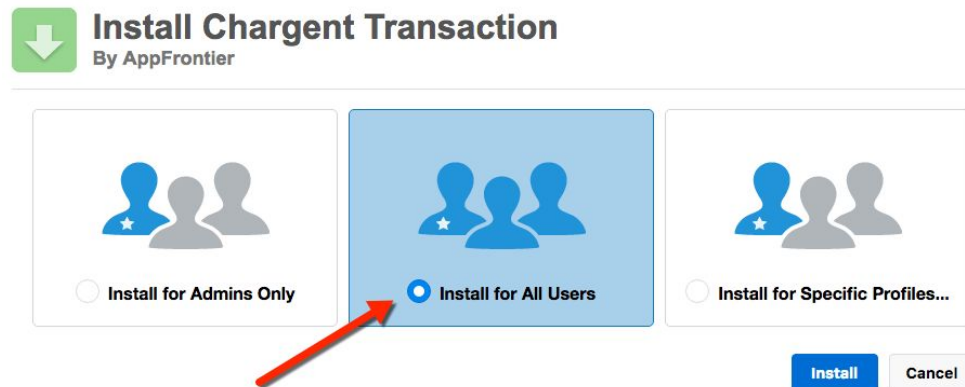
Please install **only one** Transaction package. [Which Package?](#)

- Install *Chargent Orders* into [Production](#) or [Sandbox](#) (version 4.20, released [May 6, 2016](#))
or
- Install *Opportunities* into [Production](#) or [Sandbox](#) (version 4.20, released [May 6, 2016](#))
or
- Install *Cases* into [Production](#) or [Sandbox](#) (version 4.20, released [May 6, 2016](#))

IMPORTANT: Please install only one of the transaction packages.

Let's install the Chargent Orders package.

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



That's it! As with the base 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!

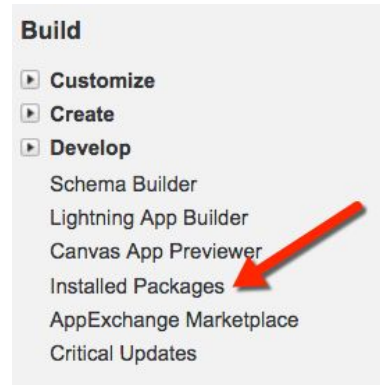
3 License Assignment

Immediately after installation, we recommend that you assign your 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 Chargent without license assignment.

Users that do not have a Chargent license will not have access to Chargent objects, fields, tabs or data. To assign licenses, follow these steps:

1. Login to your Salesforce.com account, and click on the **Setup** link in the upper-right corner.
2. Scroll down to find the link on the left-hand menu and click **Installed Packages**.
3. 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 disables? If you do not see a **Manage Licenses** link, it may be that you are looking at the Chargent Base package. On the Installed Packages page, ensure that you click on the package link.

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](#).

Package Details

Chargent Orders

[Help for this Page](#)

[Back to Previous Page](#)

Package Name	Chargent Orders	Publisher	AppFrontier LLC
Status	Active	Allowed Licenses	10
Expiration Date	Does not Expire	Used Licenses	3

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

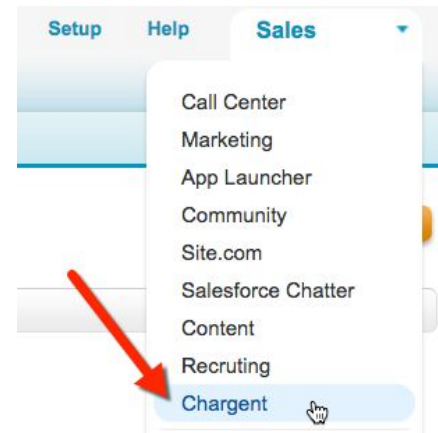
Licensed Users				
		Add Users	Remove Multiple Users	
Action	Full Name ↑	Role	Active	Profile
Remove	AS Chargent Demo. TZorc	CFO	<input type="checkbox"/>	System Administrator
Remove	Demo. Chargent		<input checked="" type="checkbox"/>	System Administrator

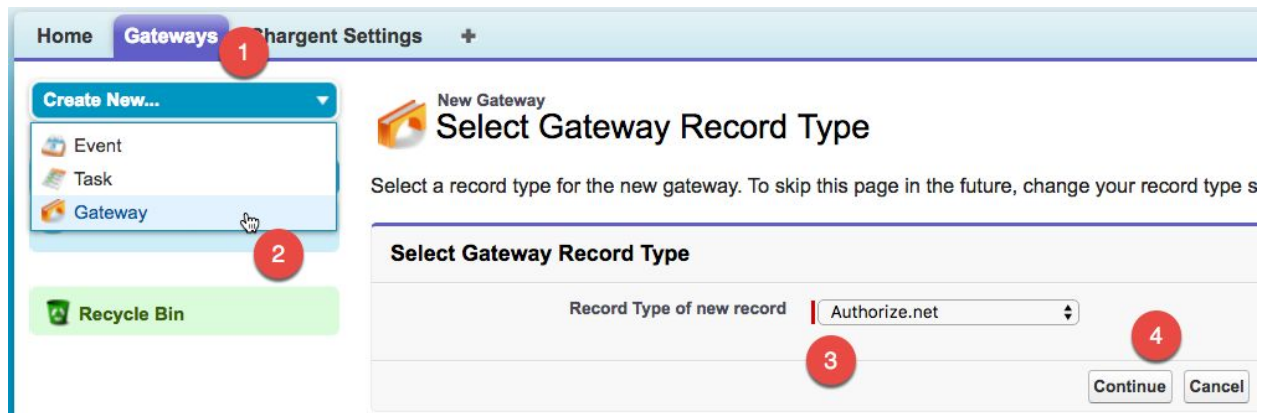
4 Choose a gateway

After installing the base package and one of the transaction packages, then assigning licenses to your users, the next major step is to configure your payment gateway.

In the upper-right Salesforce menu, switch to the Chargent application (see the figure).

Next, navigate to the Gateway page, then click the **Gateways** tab, then click **Create New > Gateway**, then choose a **Record Type** such as *Authorize.net*. Click **Continue** to go to the New Gateway page. See the figure below.





On New Gateway page, you'll need to complete the settings and **Save** it. Below, we provide links to all of the gateway providers. For details on what credentials are required, see the [Gateway Setup](#) section of our documentation.

Gateway Providers

- [AstroPay](#)
- [Authorize.net](#)
- [AvidiaPay / linked2pay](#)
- [Barclaycard ePDQ](#)
- [Braintree](#)
- [Chase Orbital](#)
- [Cybersource](#)
- [eProcessing Network](#)
- [eWAY](#)
- [Forte](#)
- [iATS Payments](#)
- [Merchant e-Solutions](#)
- [Moneris](#)
- [NMI](#)
- [Optimal Payments Netbanx](#)
- [PayPal Payflow Pro](#)
- [PayU Latam](#)
- [Realex Payments](#)
- [Stripe](#)
- [USAePay](#)
- [Vantiv \(Litle\)](#)

5 Page Layouts

The next step is to add the client and payment fields and buttons to your *Opportunity*, or *Case* page layout, and then enable the **Transactions** related list.

If you are using Chargent Orders: You can skip this step for now. Since it is a custom object in Salesforce.com, Chargent Orders has its own page layout. You may want to come back later and customize the layout to remove fields you won't be using.

Chargent Page Layouts you can use are provided with the Chargent package, but if you have customized your Opportunities or Cases page layouts, you will need to add the Chargent fields manually.

To see the sample layouts for the packages, navigate as follows:

Chargent Orders: Setup > Create > Objects > Chargent Order

Opportunities: Setup > Customize > Opportunities > Page Layouts

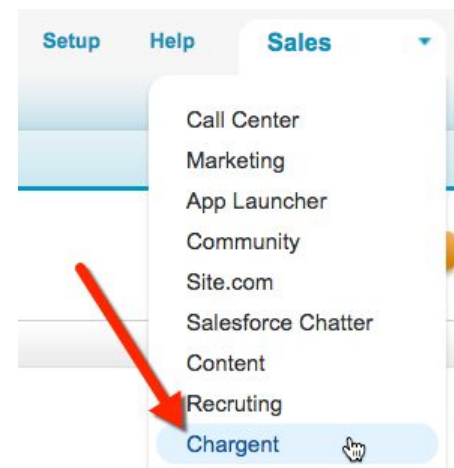
Cases: Setup > Customize > Cases > Page Layouts

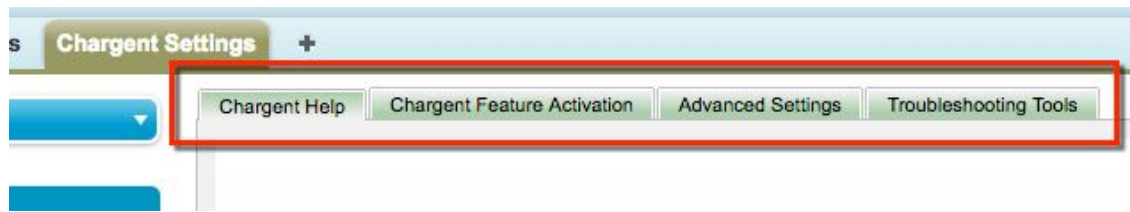
6 Chargent Settings

The Chargent Settings tab is accessible from the module menu in the upper-right corner of any Salesforce.com page (see the figure to the right). Here, you'll find links to our complete help documentation, access to custom settings for Chargent, and more.

Take time to explore each of Chargent 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.

7 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:

- Billing First Name and Last Name
- Billing Address
- Billing Zipcode
- Payment Method (Credit Card or Check)
- Card Type (Visa, Mastercard, Amex or Discover)
- Card Number
- Card Expiration Month (2 digits - MM)
- Card Expiration Year (4 digits - YYYY)

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](#).

8 Testing Chargent

We strongly recommend that you test your configuration before deploying your app to production, and 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](#).