INSTALLATION MANUAL

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Introduction

Legal Information

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How to get AAkonsult Payments Installed and Running

The steps below provide an overview of how you can evaluate and then later get AAkonsult Payments up and running for your organisation

1. Install AAkonsult Payments from the AppExchange
2. Create a demo facility so you can take test transactions (go to About AAkonsult Payments Tab, Create Samples button)
3. Apply for a Merchant Facility (This can take upto a few weeks, so best to start early)
4. Complete the post install instructions
5. Work through a day in the life of your organisation using AAkonsult Payments - configure workflows, receipts, email templates to meet your needs (see User Manual)
6. When the bank provides Merchant Details (Step 3), order and sign up for AAkonsult Payments and we will start the payment gateway provisioning
7. Once provisioning is complete, you will be given a username and will need to call in for a password. Enter these details into Salesforce Merchant Facility and do a test live transaction.

How to order AAkonsult Payments

To obtain an AAkonsult Payments Account, you will need to:

- To have an eCommerce Merchant Facility
- Send AAkonsult (info@aakonsult.com) your company details. These include: Organisation Legal Name, Trading as Name, Company No/ABN/ACN, Postal Address, Delivery Address, website Finance or Executive Persons Name (including Saluation), Phone, Fax, Email, Title.
- Pay for first years subscription at aakonsultpayments.com/pricing
- You will receive a Direct Payment Solutions (DPS) username/password from AAkonsult - these will be entered into the Merchant Facility in Salesforce and your account will be live.

Contact AAkonsult at info@aakonsult.com or phone +61 (3) 9020 7067 if you have any further questions

NOTE: Contact AAkonsult if you require a Test/demo Facility.

What is required beforehand?

You will need:

A **Merchant Facility** from your Bank

One of the following versions of **Saleforce**:

- Enterprise Edition (EE)
- Performance Edition
- Unlimited Edition (UE)
- Developer Edition (DE)

AAkonsult Payments application

What are the steps to for a complete install?

Thank you for using AAkonsult Payments.

This guide will step you through the installation process and initial setup of AAkonsult Payment. The installation requires a moderate level of salesforce.com administration experience. If you prefer, you can engage an AAkonsult consultant to assist.

Steps

The steps required for installation are:

1. Set up an eCommerce Merchant Facility
2. Install AAkonsult Payments from the AppExchange
3. Activate Force.com Sites
4. Set up security for users
5. Customise to your requirements (workflows, page layout, buttons etc)
6. Publish payment forms on your website (User Manual)

eCommerce Merchant Facility

How to obtain a eCommerce Merchant Facility

Your bank can provide you with Visa/MasterCard Merchant Facilities.

1. Contact your bank for an eCommerce Merchant Facility for Direct Payment Solutions (DPS)

In order or use AAkonsult Payments, you need to have both a Payment Gateway (Included with AAkonsult Payments) and a Merchant Facility.

Please note the following in regards to getting a Merchant Facility:

- This is a key requirement before you are able to go live with AAkonsult Payments.
- It can take a few weeks.

If you are planning on using Authorize.Net, then please see How to obtain an eCommerce Merchant Facility for Authorize.Net

When contacting your bank, you need to ask for an "eCommerce Merchant Facility for Payment Express by Direct Payment Solutions (DPS)".

If you are with the Commonwealth Bank of Australia, you will also need to specific that you need and internet merchant account via CommWeb and that you would like to have the following transactions Purchase/Refund/Authorisation/Complete

If you are in North America, please contact AAkonsult at info@aakonsult.com and we can provide a contact.

If you are unsure if your bank is supported, please check the Payment Express website at: http://paymentexpress.com.au/Knowledge_Base/Bank_Guides If your bank is not listed, there is often options available, so please contact AAkonsult at info@aakonsult.com

2. Ensure you have the following policies on your website:

2.1 Contact Information

Your website will be checked items such as:

- The domain name matches the domain name on the registration form
- Your trading name (eg. Logo) is clearly visible
- Your organisation is the owner of the domain
- Your address, including country code are on the site
- Contact email and contact phone number

2.2 Privacy policy

Names/addresses are stored securely in Salesforce. We also store IP address and browser information for diagnostics and fraud prevention. Credit Card No's and CCV's are NOT stored in Salesforce, but tokens for recurring billing might.

You should check with your legal advisor when creating the Privacy Policy. In addition, there are many organisations that provide generators of privacy policies on the web to provide you with a starting point, plus organisations such as LawLive that can assist.

2.3 Refund policy

You will need to include a details on your policy for refunds. These should comply with local laws.

An example (please contact your legal advisor before basing your policy on this):

Refund Policy:

Please choose carefully. We do not normally give refunds if you simply change your mind or make a wrong decision. You can choose between a refund, exchange or credit where goods are faulty, have been wrongly described, are different to the product purchased on the website or don't perform as advertised.

3. Check your PCI DSS compliance

Your bank may insist on PCI DSS compliance scans. Check the organisation is currently approved for PCI compliance checking. Some scanning vendors are:

- McAfee PCI Security service: **http://www.mcafeesecure.com/us/products/pci.jsp**
- Trust Guard: **http://www.trust-guard.com/PCI-Compliance-s/65.htm**

4. Notify your bank that the payment form is hosted by Salesforce (SaaS)

It is the Salesforce website that is capturing and transmitting the details and not your own. This means the solution you are are using is known as Software as a Service (SaaS) or cloud based.

Salesforce has all the security accreditation levels required. You can see these are:

- https://trust.salesforce.com/trust/learn

- Salesforce PCI Level 1 compliance as announced at: http://blogs.salesforce.com/product/2012/01/announcing-pci-certification.html

5. Other notes:

5.1 Contact AAkonsult if your bank is not one of the major banks

We'll check compatibility and will provide guidance for moving forward.

5.2 Contact credit card organizations if you require American Express, Diners Club or other card types.

Contact these organisations separately and ask for a Merchant Account to be setup. AAkonsult Payments includes the first Merchant Facility free of charge. The second and subsequent ones incur a one off fee.

6. Activate the Merchant Facility by signing up with AAkonsult Payments.

See How to order AAkonsult Payments

How to obtain an eCommerce Merchant Facility for Authorize.Net

AAkonsult Payments licensing is for use with Authorize.net Accounts that have signed up through. Payment Gateway by using the following link: AAkonsult Authorize.Net

Should you already have an Authorize.Net account, please contact info@aakonsult.com for pricing information as our published rates are for those accounts that are linked to AAkonsult Authorize.Net

1. Setting up a demo/test Authorize.Net Facility

You can request an Authorize.net test account from Authorize.Net at: https://developer.authorize.net/sandbox/ This is known as a sandbox account.

Once you have your login details, please proceed to step How to setup Authorize.Net making sure you select "Sandbox" as the environment.

Authorize.net includes a number of test cards that can be used. There are a number of scenarios that you can be tested, including both successful and failed transactions. Please see http://developer.authorize.net/tools/errorgenerationguide/ for more details.

2. Requesting a production Authorize.Net Facility

To use AAkonsult Payments with Authorize.Net, you need to register for Authorize.net Payment Gateway by using the following link: AAkonsult Authorize.Net

In order or use AAkonsult Payments, you need to have both a Payment Gateway and a Merchant Facility.

If your location is in the US/Cananda then you can sign up for both the Payment Gateway and Merchant Facility using the link: AAkonsult Authorize.Net

If your location is in UK/Europe or Australia, then you can sign up for the Payment Gateway using the link: AAkonsult Authorize.Net and obtain the Merchant Facility from your local bank. Please see How to obtain a eCommerce Merchant Facility for details on getting a Merchant Facility from your bank.

Once you have your Authorize.Net credentials, please see How to setup Authorize.Net

AppExchange

How to download from the AppExchange

The AppExchange holds extra applications that can be downloaded for Salesforce.

1. Check prerequisites

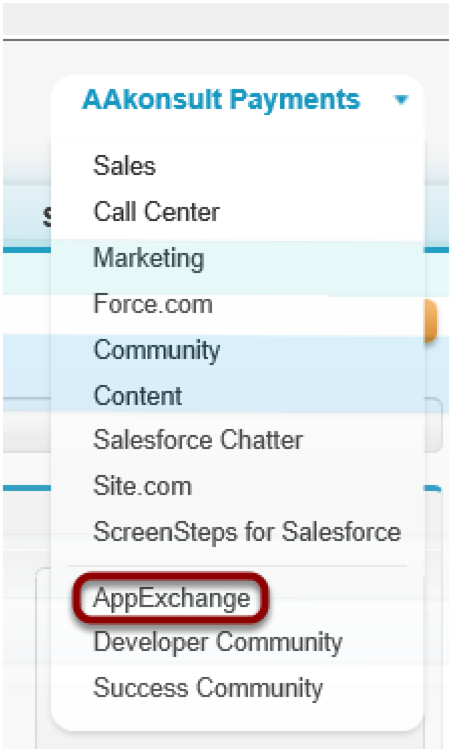
Before installing AAkonsult Payments from the AppExchange, check you have the following - Developer Edition (DE), Enterprise Edition (EE) or Unlimited Edition (UE) of Salesforce

More information about Salesforce can be found at www.salesforce.com

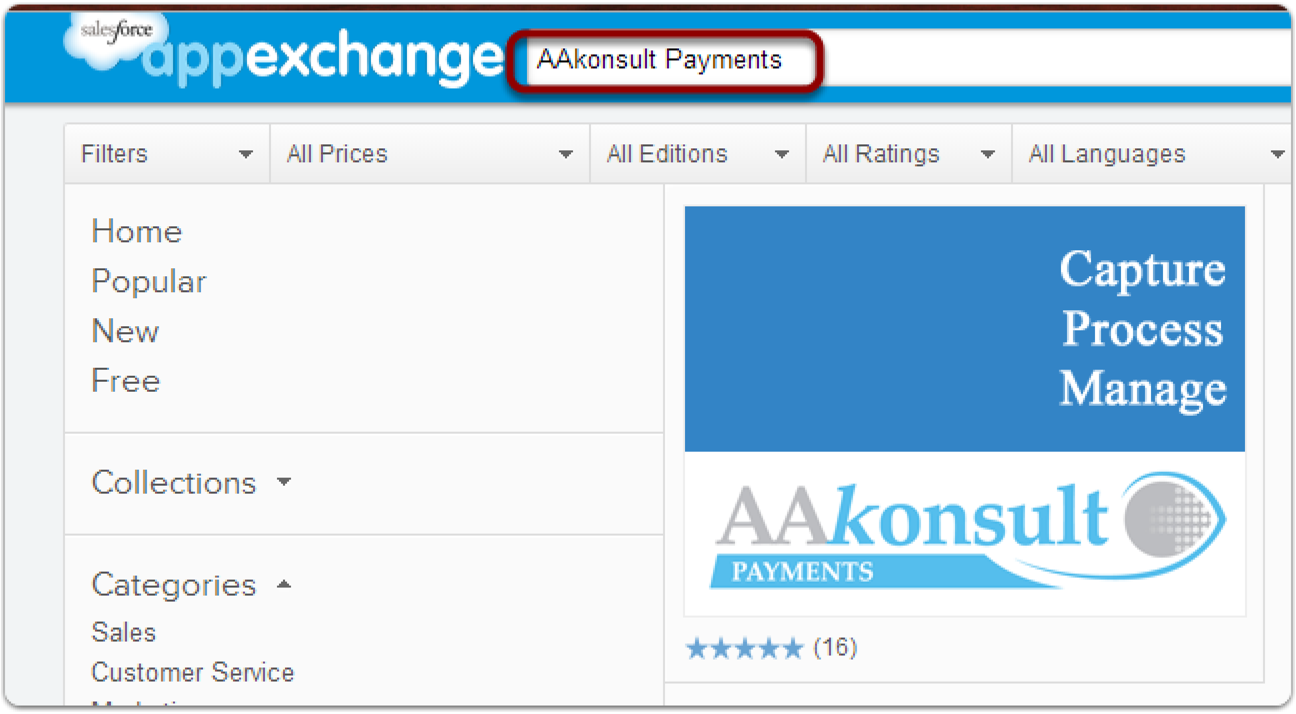
2. Navigate to the AppExchange - www.appexchange.com

Or you can go to the AppExhange within Saleforce (see 2.1)

2.1 Find the AppExchange within Salesforce by using the drop down menu at the top RHS of the screen.

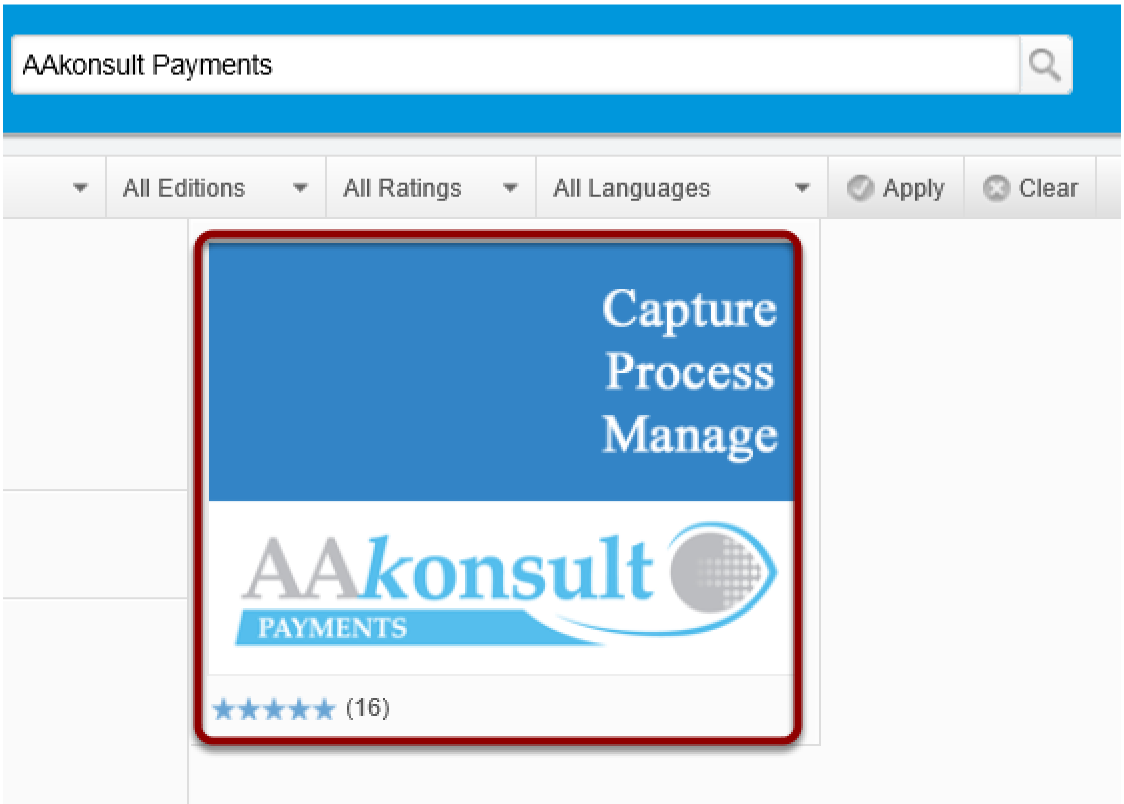


2.2 Search for our application 'AAkonsult Payments'



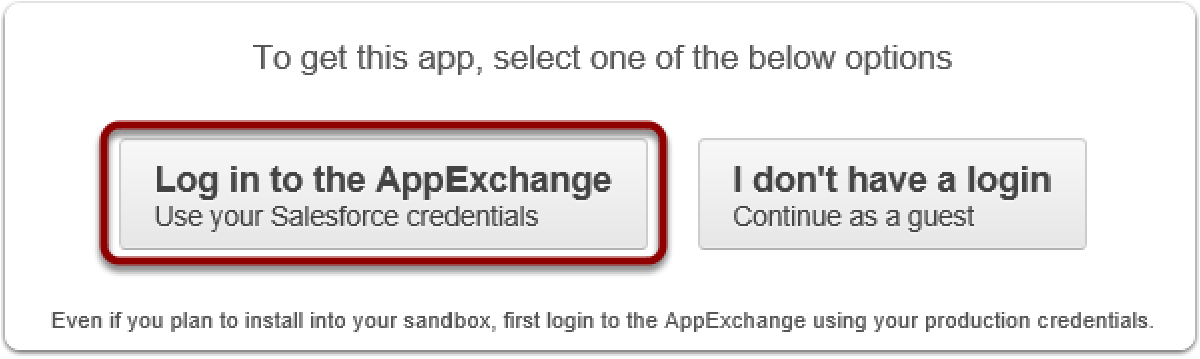
3. Install AAkonsult Payments

3.1 Double click to open the AAkonsult Payments app

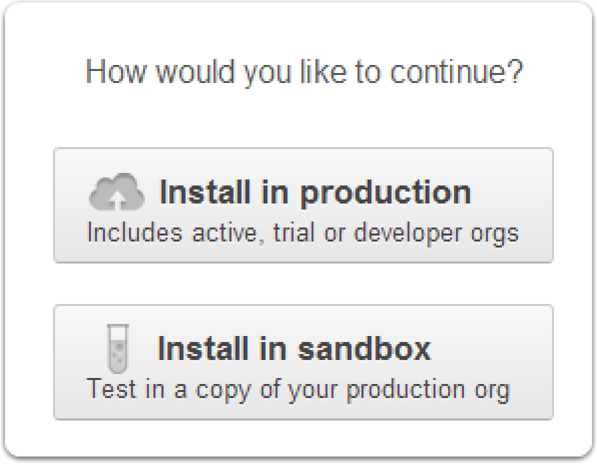


3.2 Click on the 'Get It Now' button

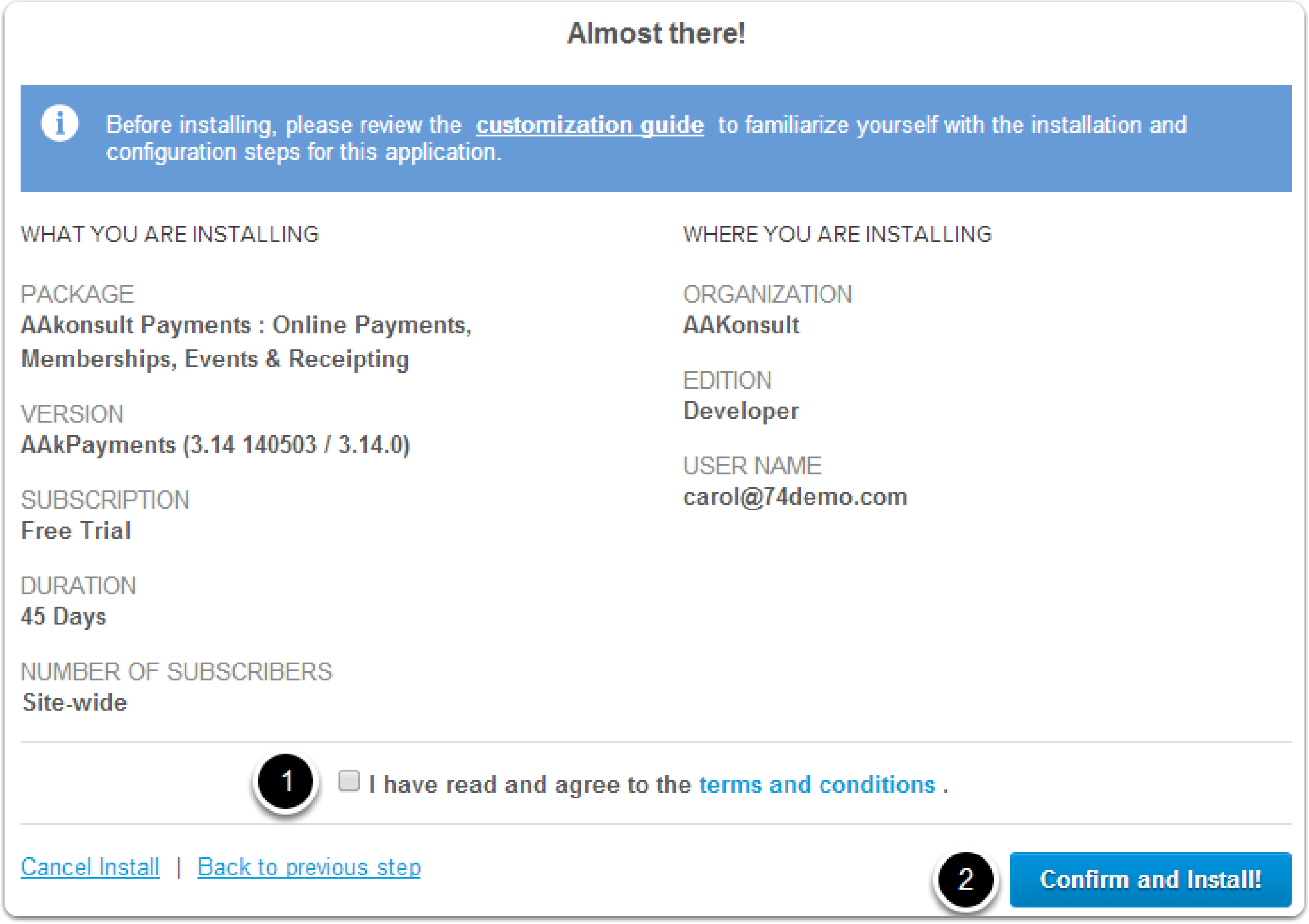
3.3 Enter your Salesforce login details



3.4 Choose either Production (live) or Sandbox (test) version of Salesforce



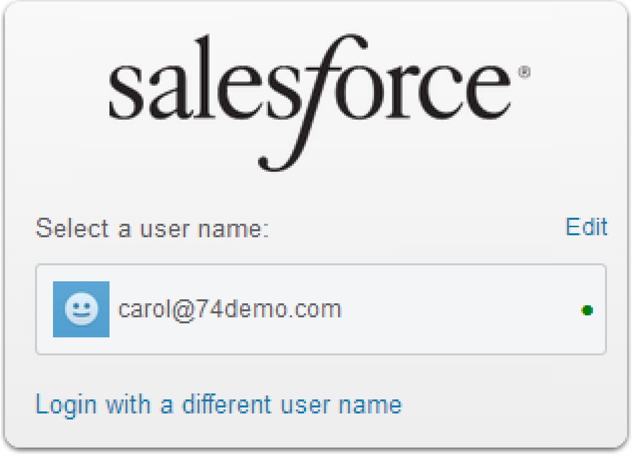
3.5 Confirm and install your choice



- Read and tick the Terms and Conditions box
- Salesforce will redirect you into an Installation Wizard

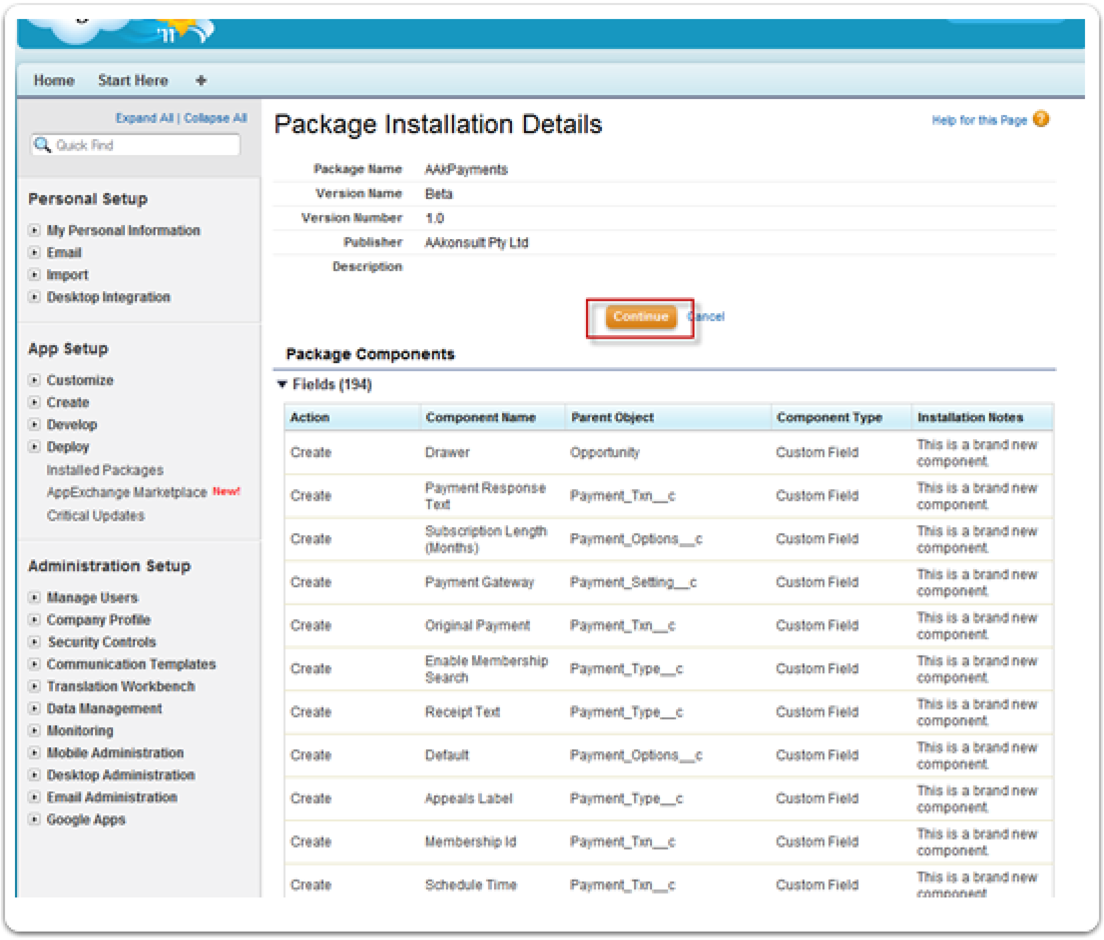
4. Follow the Salesforce Installation Wizard

4.1 Select the user(s) that will receive the AAkonsult Payments application



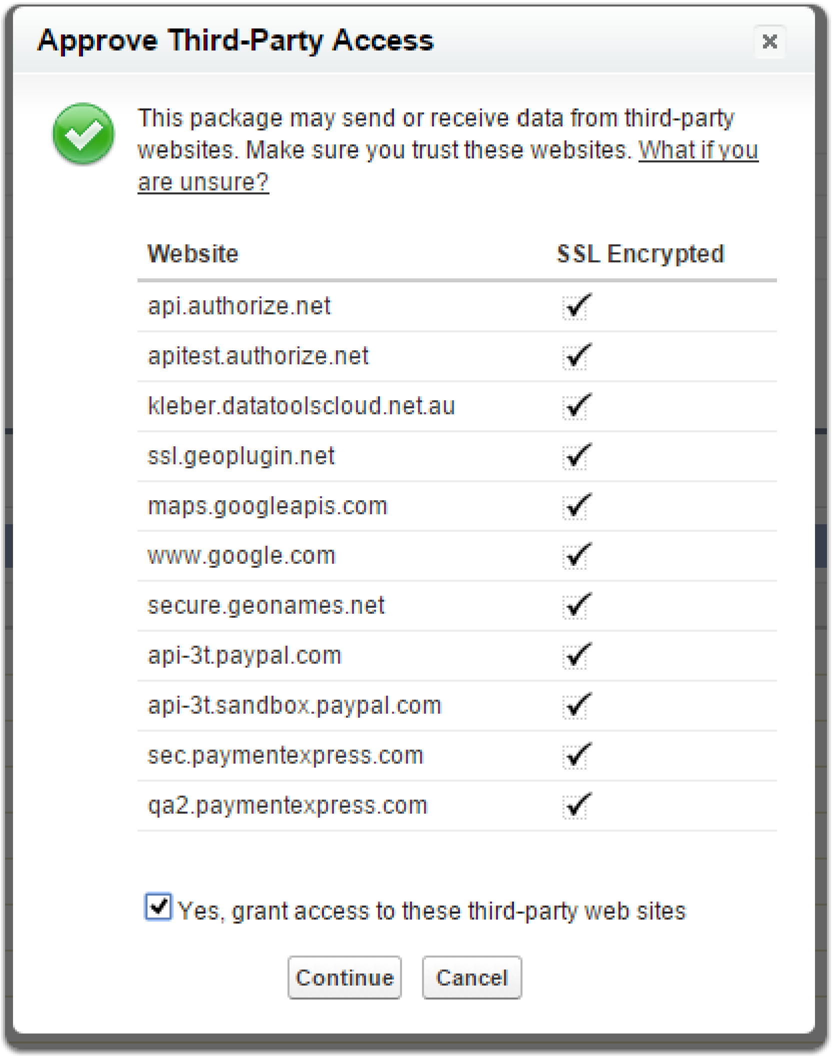
After clicking on the user, please wait while Salesforce loads the Installation Wizard.

4.2 Click on 'Continue'



This step lists the components that are being brought into your Saleforce version.

4.3 Grant Third-Party Access to all websites shown



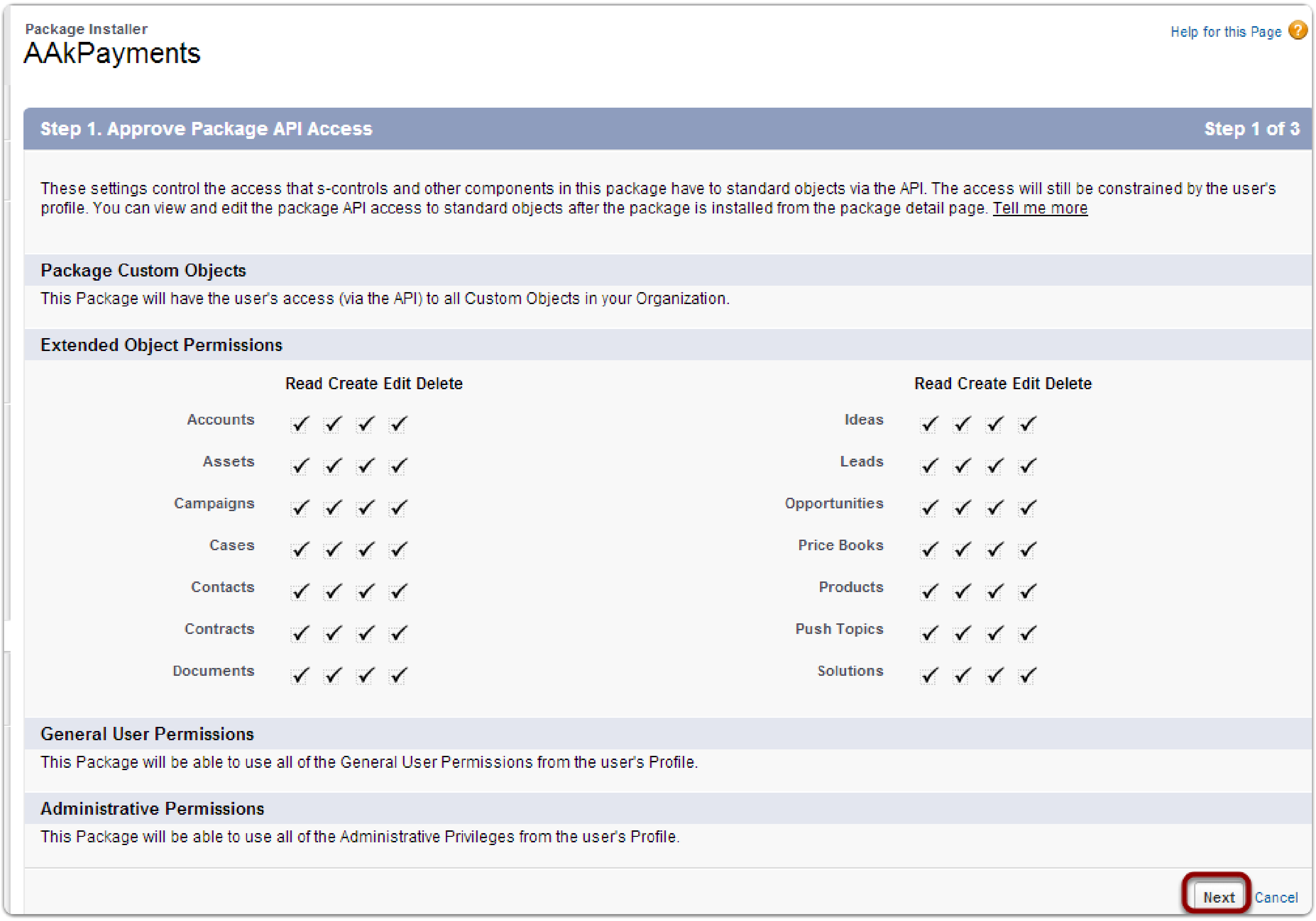
AAkonsult uses the web service provided by third party Direct Payment Solutions, PayPal, Geonames.org and Google.

These 3rd party integrations are mainly used on the checkout forms, refund forms, tokenisation and token charge forms.

- ssl.geoplugin.net - obtains the users city and country by IP address. This enables the forms to be prefilled
- www.google.com - is used for the CAPTCHA on checkout form
- maps.google.com - Google Places API. Used for autocomplete on address fields in checkout and manual payments
- secure.geonames.org - provides auto-complete for suburb and post codes
- ...paypal.com - allow for paypal transactions - purchase/refund/authorisation/auth-complete
- ...paymentexpress.com - allow for credit card transactions - purchase/refund/authorisation/auth-complete/expiry date updates and recurring charges
- api.authorize.net - Authorize.net production
- apitest.authorize.net - Authorize.net Sandbox/testing environment

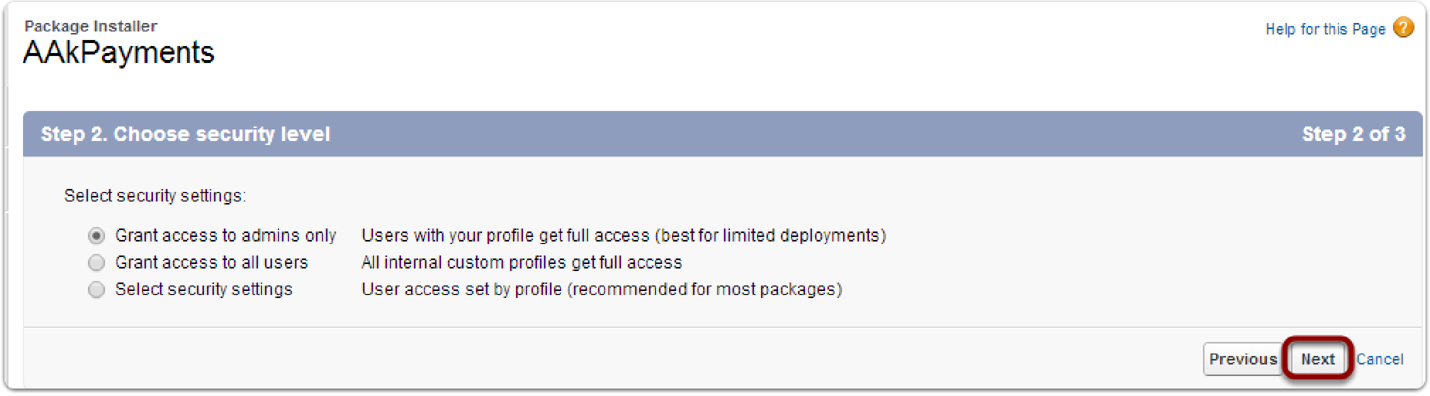
- kleber.datatoolscloud.net.au - DataTools Kleber - used for autocomplete on address fields in checkout and manual payments

4.4 Select 'Next'



These settings can be changed after installation

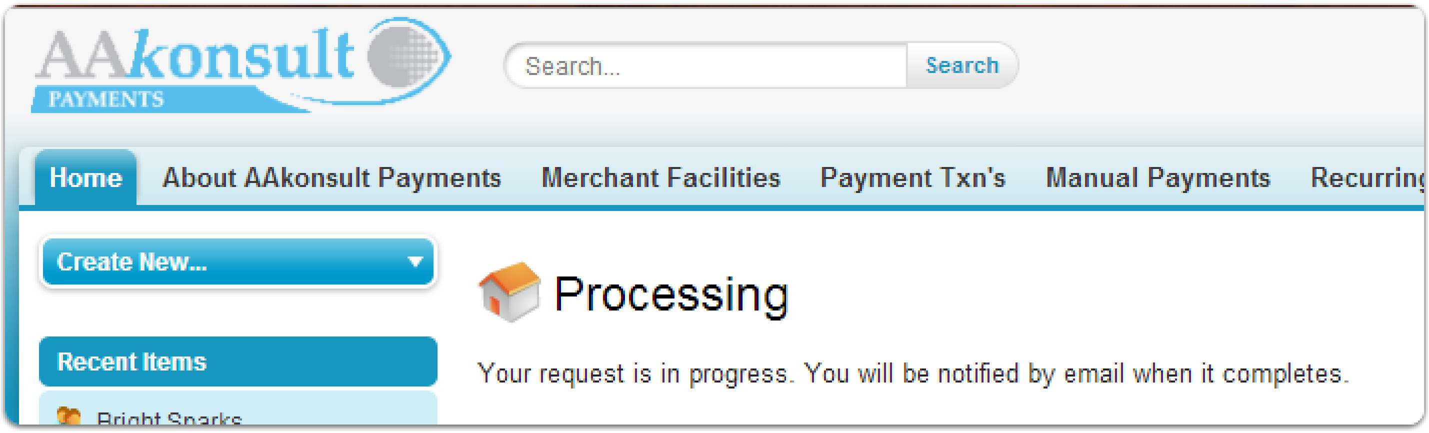
4.5 Choose your security settings



Granting access to admins only (System Administrators) allows for internal testing before the the application is fully deployed to all users.

4.6 Click 'Install' to continue

4.7 Await email notification when install is complete

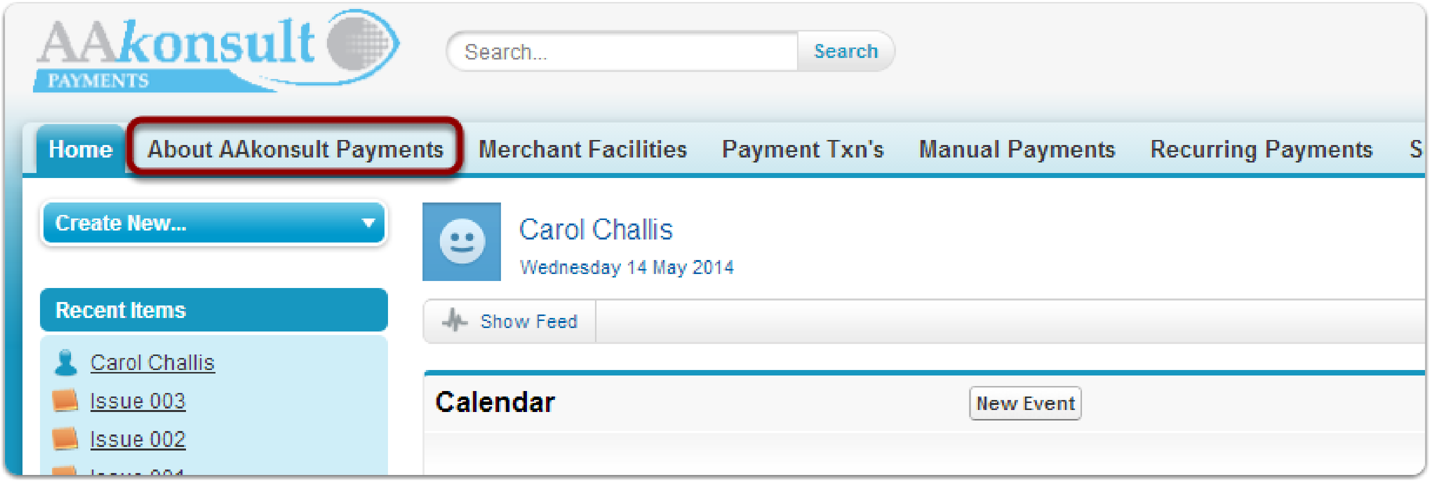


This should take between 3 to 5 minutes.

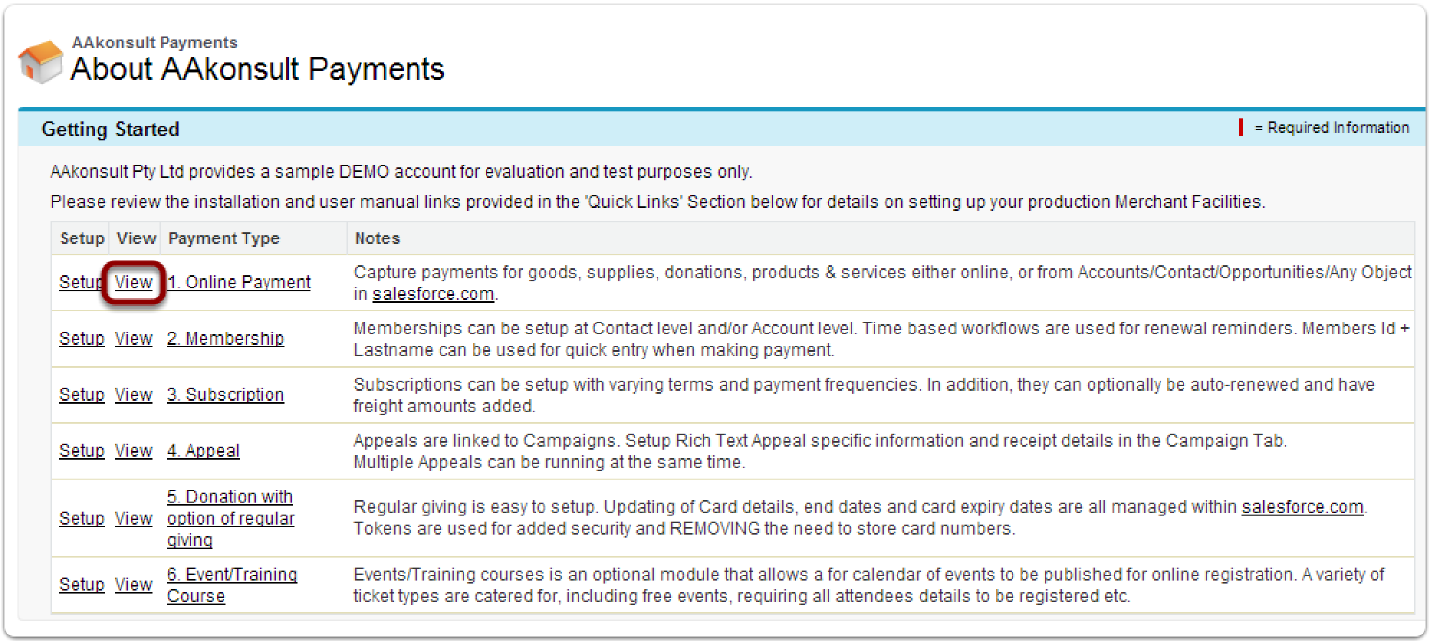
You can test out AAkonsult Payment's capabilities with our Quick Start templates

How to preview your new AAkonsult Payments product

Select the 'About AAkonsult Payments' tab



Select 'View' on one of our sample payment forms



AAkonsult Payments

About AAkonsult Payments

Getting Started | = Required Information

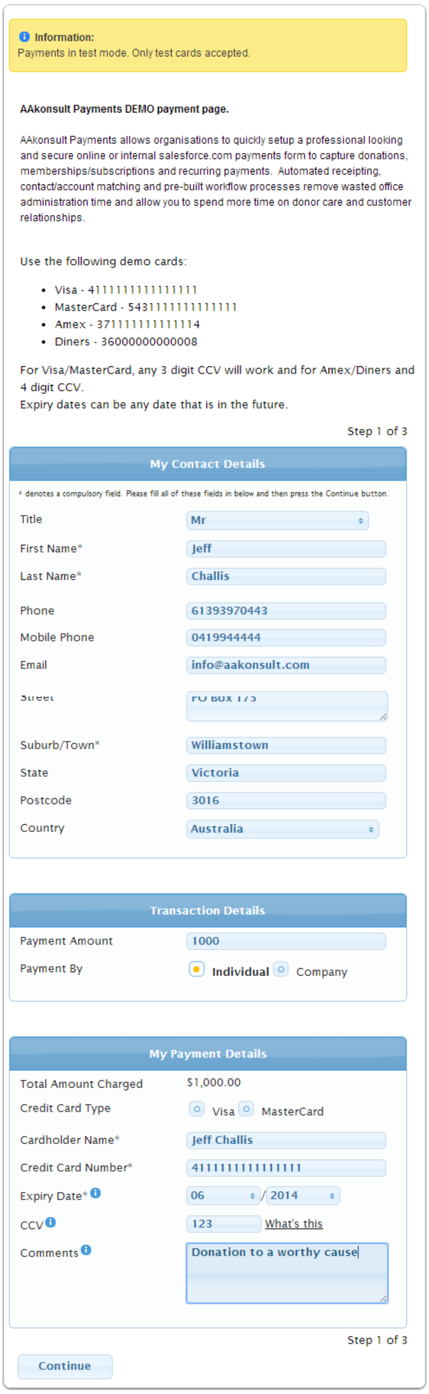
AAkonsult Pty Ltd provides a sample DEMO account for evaluation and test purposes only.

Please review the installation and user manual links provided in the 'Quick Links' Section below for details on setting up your production Merchant Facilities.

Setup	View	Payment Type	Notes
Setup	View	1. Online Payment	Capture payments for goods, supplies, donations, products & services either online, or from Accounts/Contact/Opportunities/Any Object in salesforce.com.
Setup	View	2. Membership	Memberships can be setup at Contact level and/or Account level. Time based workflows are used for renewal reminders. Members Id + Lastname can be used for quick entry when making payment.
Setup	View	3. Subscription	Subscriptions can be setup with varying terms and payment frequencies. In addition, they can optionally be auto-renewed and have freight amounts added.
Setup	View	4. Appeal	Appeals are linked to Campaigns. Setup Rich Text Appeal specific information and receipt details in the Campaign Tab. Multiple Appeals can be running at the same time.
Setup	View	5. Donation with option of regular giving	Regular giving is easy to setup. Updating of Card details, end dates and card expiry dates are all managed within salesforce.com. Tokens are used for added security and REMOVING the need to store card numbers.
Setup	View	6. Event/Training Course	Events/Training courses is an optional module that allows a for calendar of events to be published for online registration. A variety of ticket types are catered for, including free events, requiring all attendees details to be registered etc.

There are six quick-start templates to choose from that can be used by your organisation

Fill in the test form (Step 1 of 3)



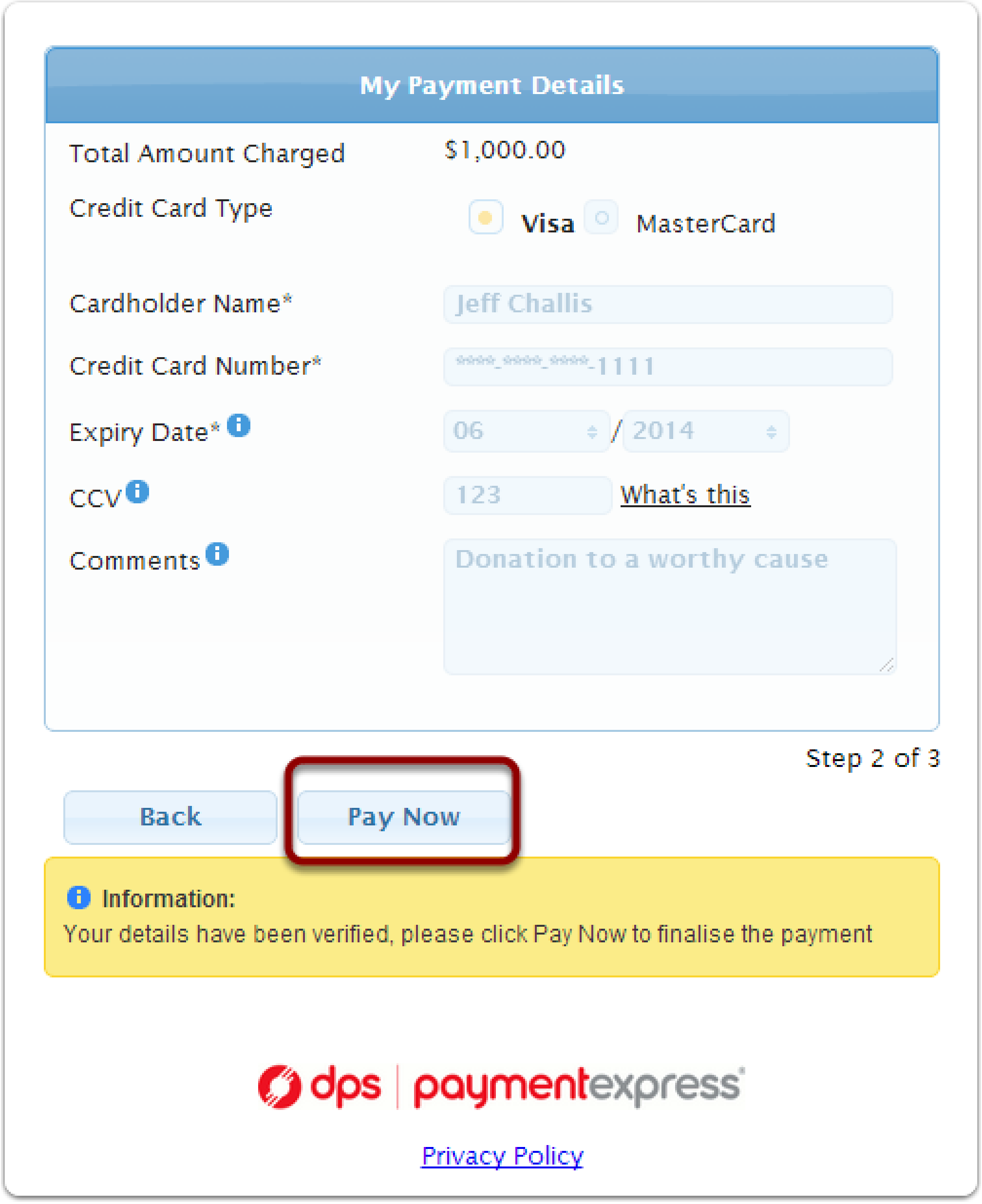
Use the following demo cards:

- Visa - 4111111111111111
- MasterCard - 5431111111111111
- Amex - 371111111111114
- Diners - 36000000000008

For Visa/MasterCard, any 3 digit CCV will work and for Amex/Diners and 4 digit CCV.

Expiry dates can be any date that is in the future.

Check test form and select 'Pay Now' (Step 2 of 3)



Receive test confirmation details (Step 3 of 3)

Set-up an eCommerce Merchant Account

Click here to find out more about [eCommerce Merchant Accounts]

Contact AAkonsult if you have any questions

Email: info@aakonsult.com

Phone: +61 (3) 9397 0443

Website: http://www.aakonsult.com/AAKPayments.html

Force.com Sites

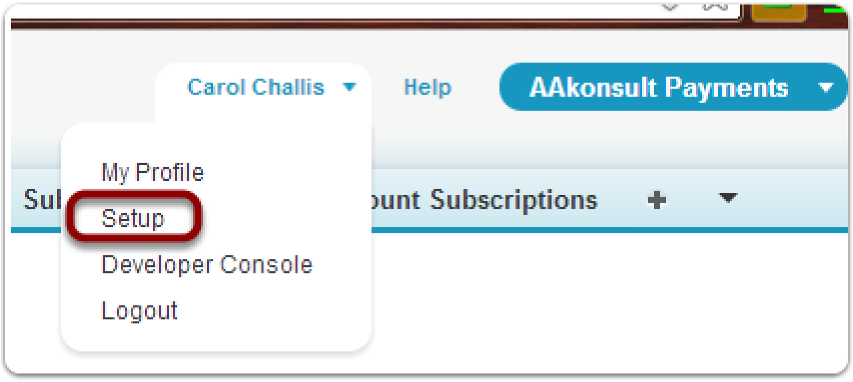
How to enable Force.com Sites

Force.com Sites enables the public facing web pages to be made visible to internet users and/or internal intranet users.

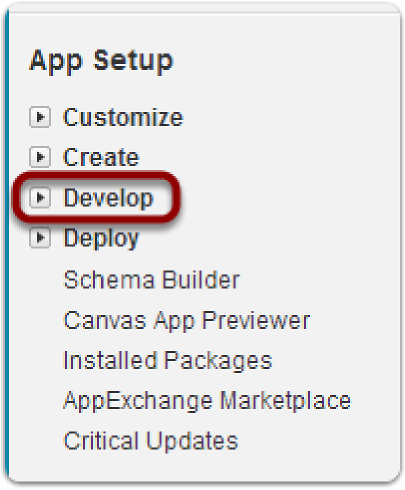
If you haven't already enabled Force.com Sites or are unsure if it's already enabled, this step through will guide your progress.

1. Navigate to the Site Detail page (Setup > Develop > Sites)

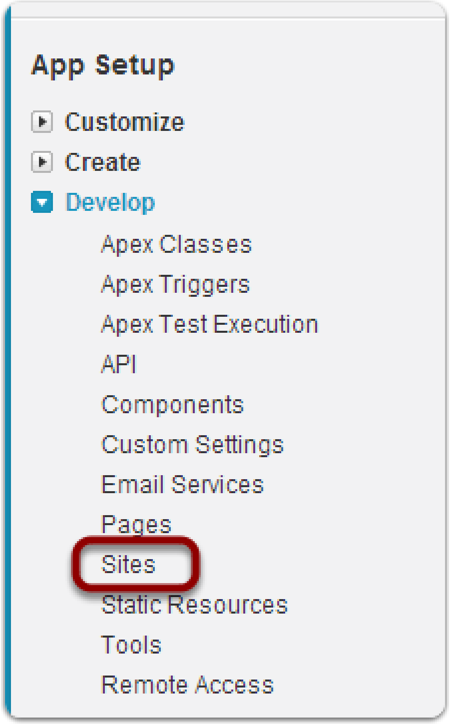
1.1 Select 'Setup' on the RHS of your Salesforce home screen



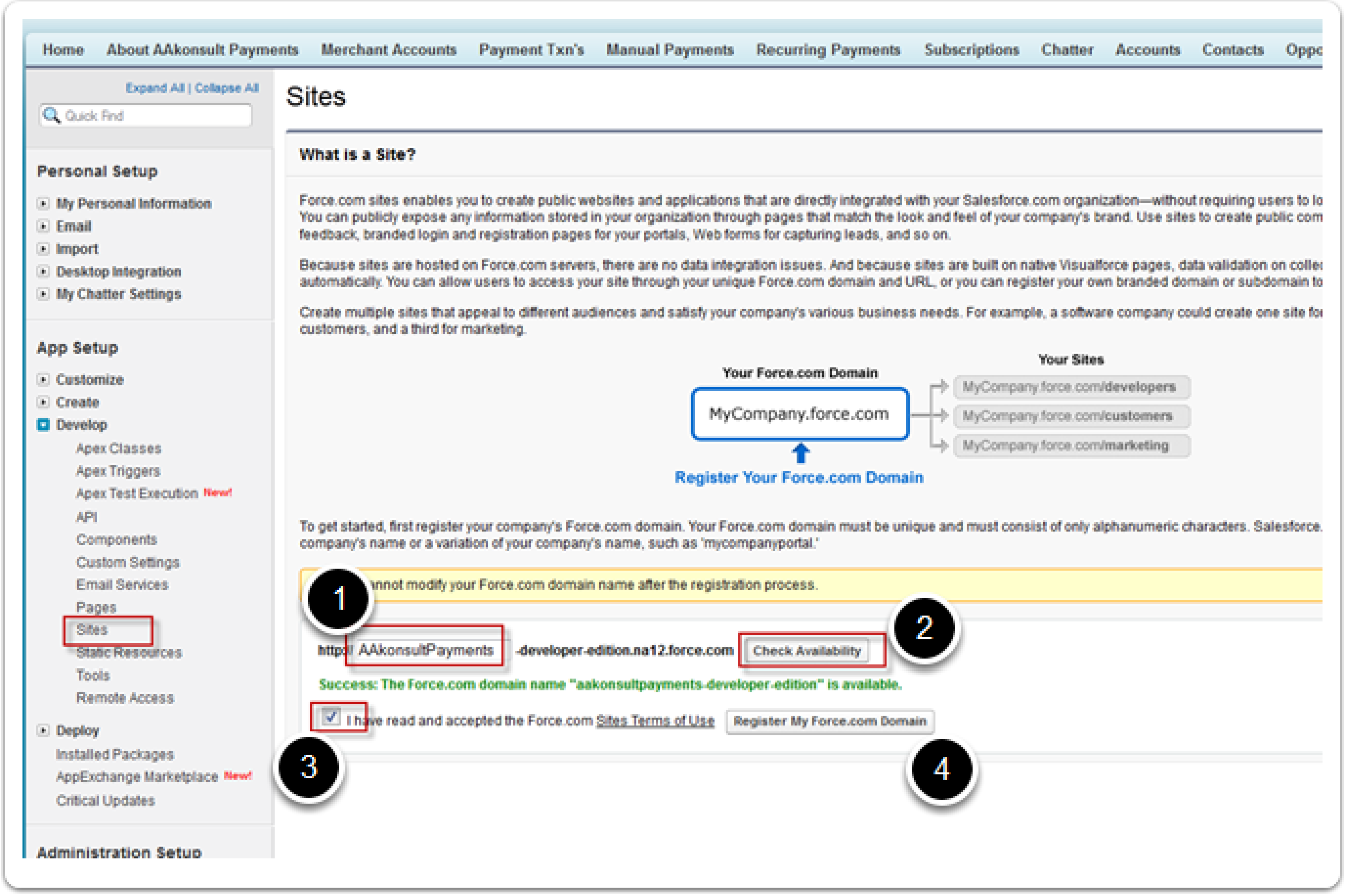
1.2 Select 'Develop' from the App Setup section on the LHS



1.3 Select 'Sites'

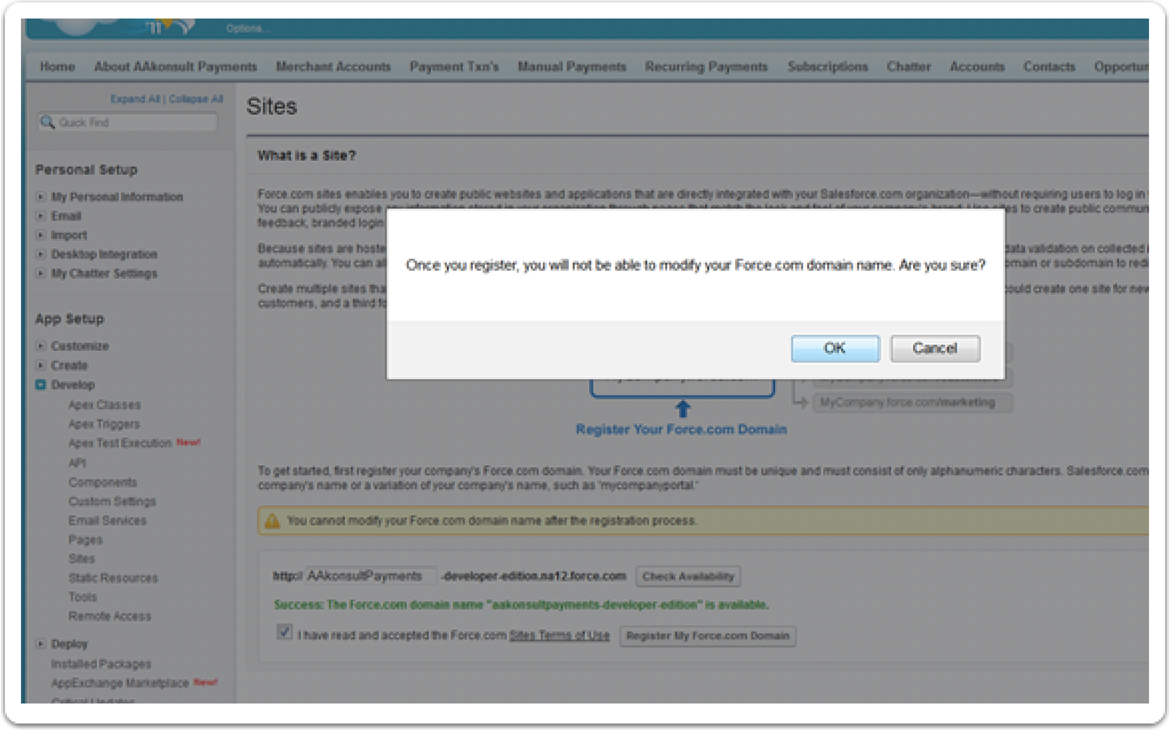


2. Create a Force.com domain name



1. Create a unique name that matches your organisation
2. Check availability
3. Agree to the 'Site Terms of Use'
4. Register your Force.com site

2.1 Confirm your domain name



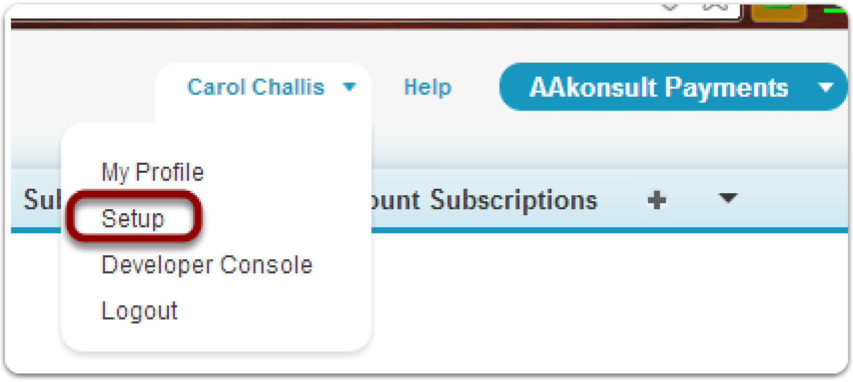
Note: You can only create a domain once so choose its name wisely.

It is not possible to amend the domain once it has been registered.

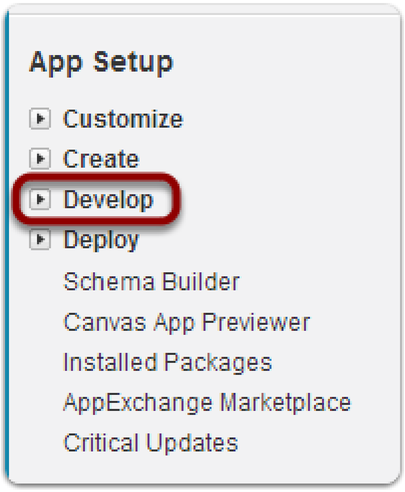
How to create a new Force.com Site

1. Navigate to the Site Detail page (Setup > Develop > Sites)

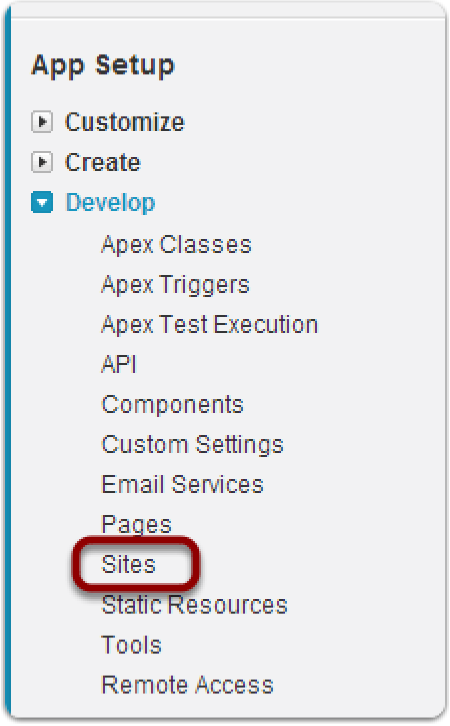
1.1 Select 'Setup' on the RHS of your Salesforce home screen



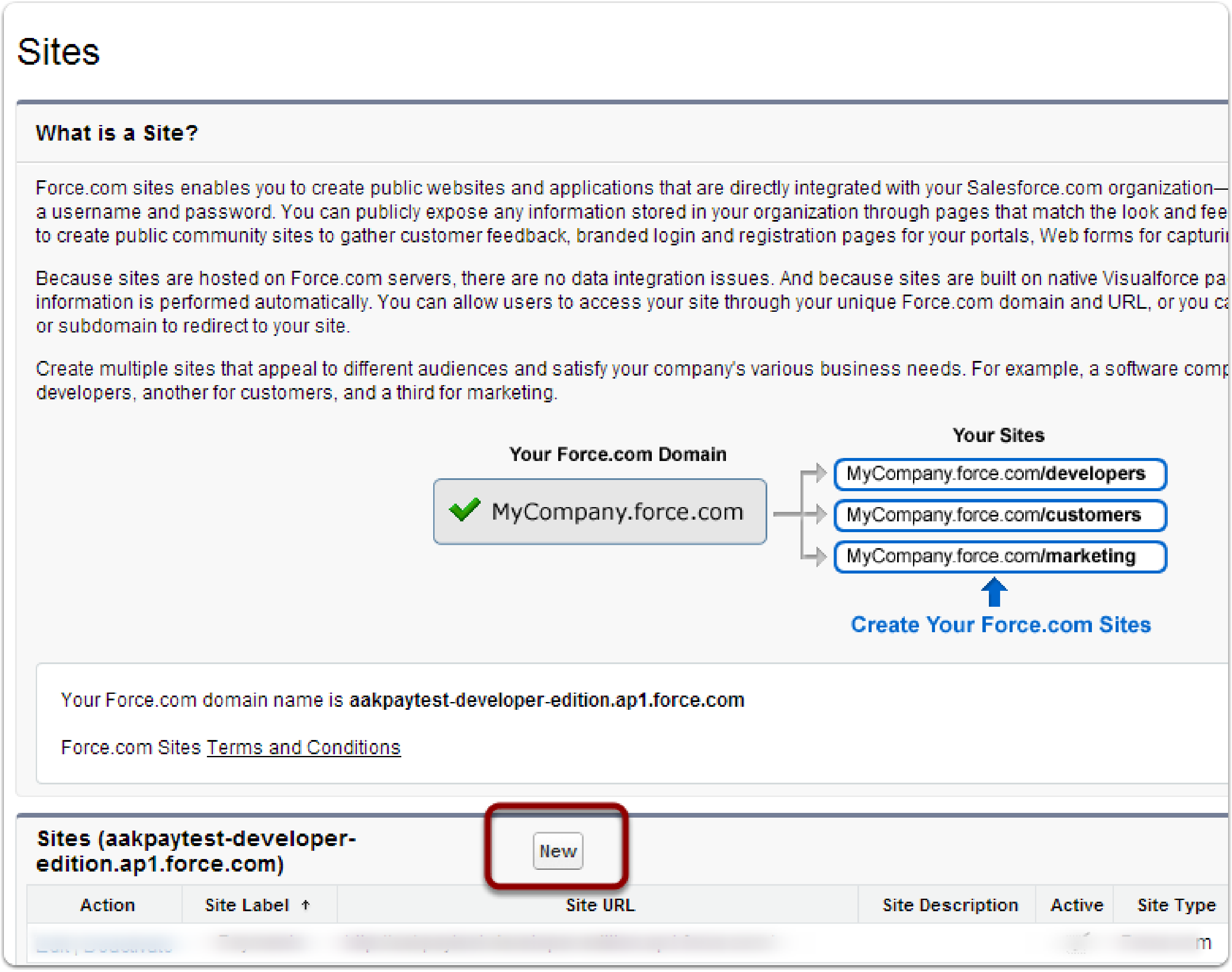
1.2 Select 'Develop' from the App Setup section on the LHS



1.3 Select 'Sites'

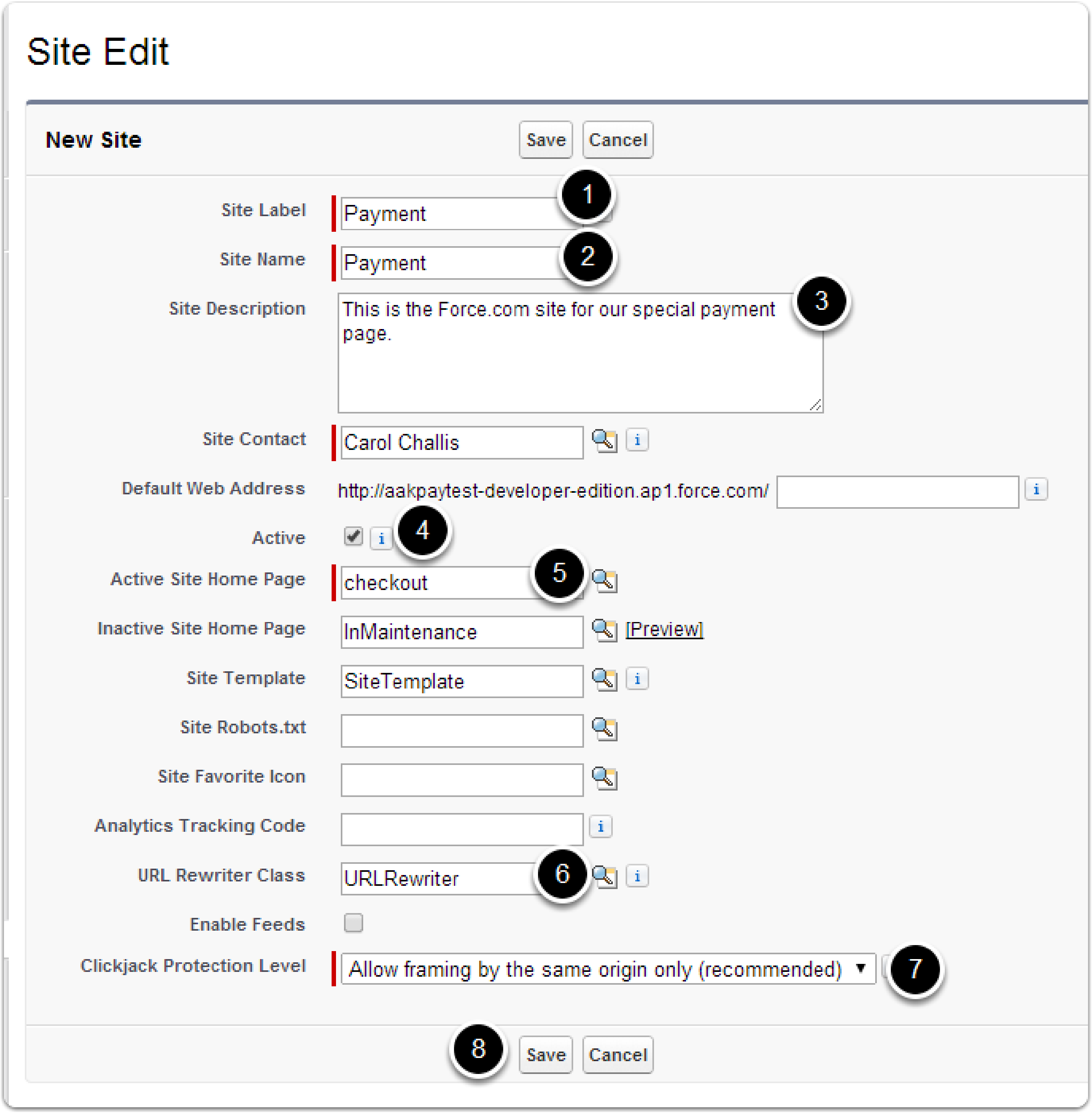


2. Select 'New'


Sites
What is a Site?
Force.com sites enables you to create public websites and applications that are directly integrated with your Salesforce.com organization—
a username and password. You can publicly expose any information stored in your organization through pages that match the look and fee
to create public community sites to gather customer feedback, branded login and registration pages for your portals, Web forms for capturi
Because sites are hosted on Force.com servers, there are no data integration issues. And because sites are built on native Visualforce pa
information is performed automatically. You can allow users to access your site through your unique Force.com domain and URL, or you c
or subdomain to redirect to your site.
Create multiple sites that appeal to different audiences and satisfy your company's various business needs. For example, a software comp
developers, another for customers, and a third for marketing.
Your Force.com Domain
MyCompany.force.com
Your Sites
MyCompany.force.com/developers
MyCompany.force.com/customers
MyCompany.force.com/marketing
Create Your Force.com Sites
Your Force.com domain name is aakpaytest-developer-edition.ap1.force.com
Force.com Sites Terms and Conditions
Sites (aakpaytest-developer-edition.ap1.force.com)
New
Action
Site Label
Site URL
Site Description
Active
Site Type

2.1 Fill in the details for your site

1. Create a meaningful **Site Label** for visitors to your site
2. Create a **Site Name** for referencing the site in the Force.com API (This will default to the Site Label)
3. Write a short **Site Description** (optional)
4. Tick the box to set your site as '**Active**'
5. Type '*checkout'* into the **Active Site Home Page**
6. Type '*URLRewriter*' into the **URL Rewriter Class**
7. Keep the default settings for other fields
8. Select 'Save'



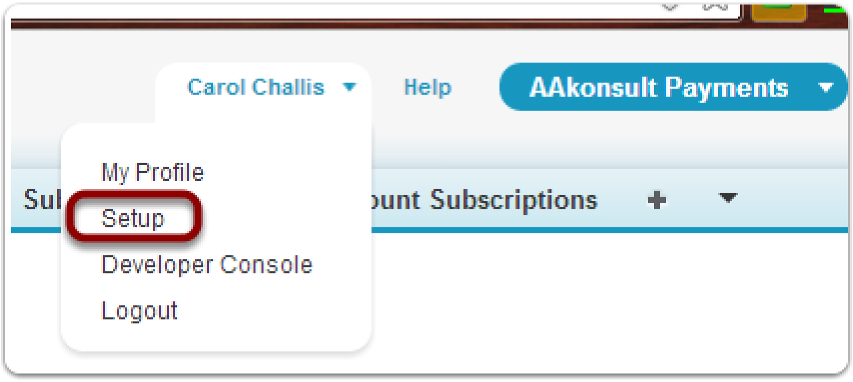
How to set up error checking for Force.com Sites

This is an optional step but provides more detailed error logging should there be a problem with the web page.

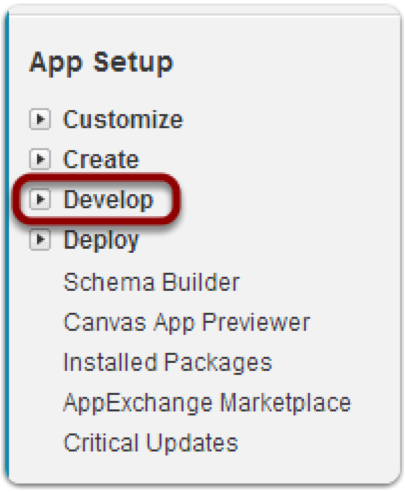
Note: This step should only be carried out if this site is only used for AAkonsult Payments.

1. Navigate to the Site Detail page (Setup > Develop > Sites)

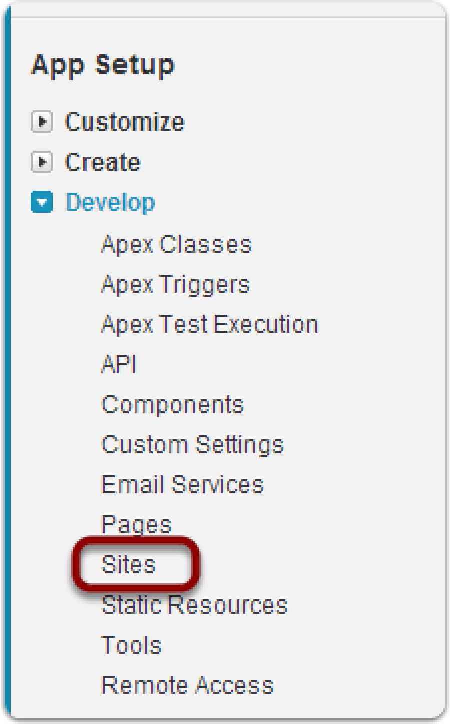
1.1 Select 'Setup' on the RHS of your Salesforce home screen



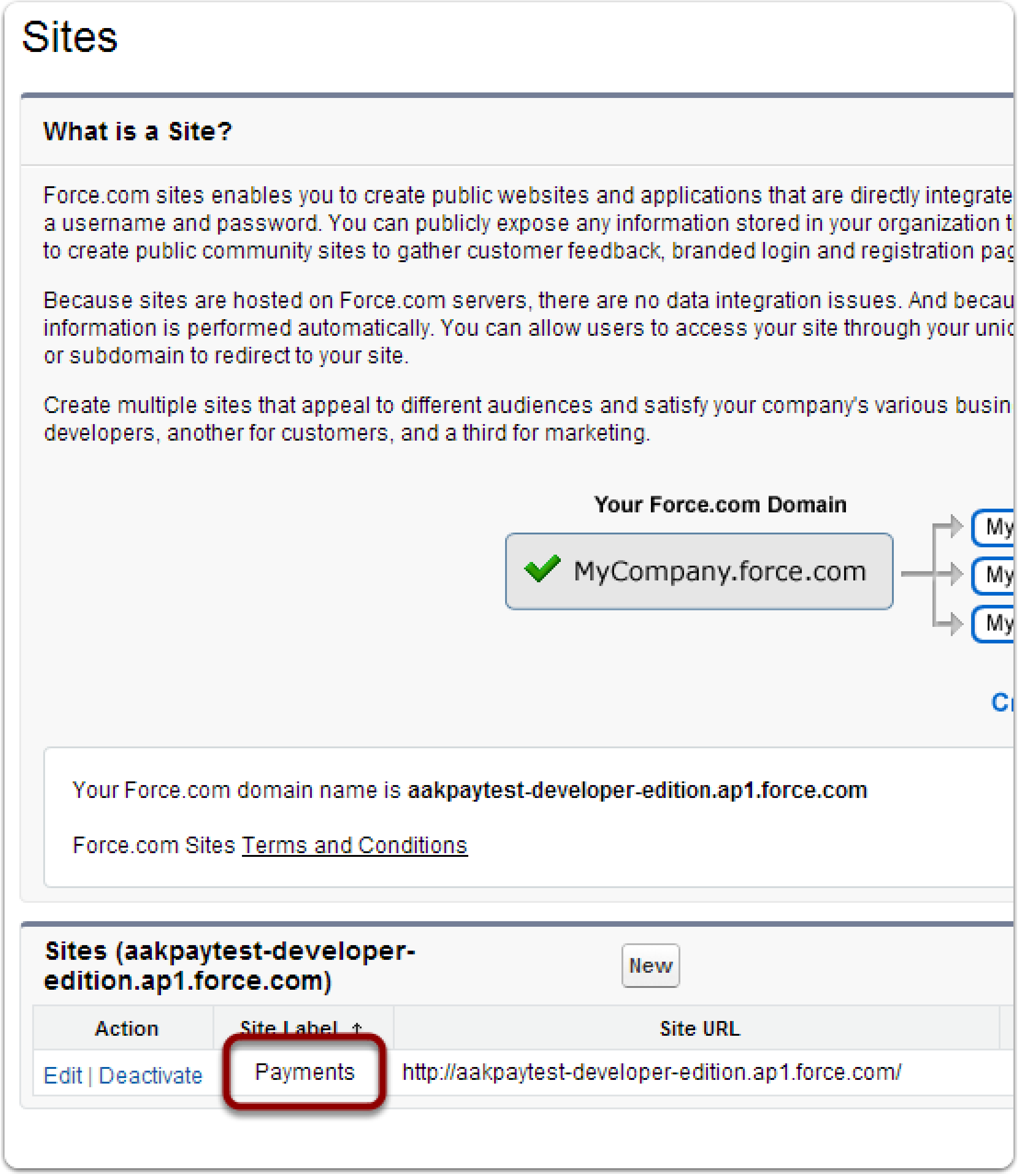
1.2 Select 'Develop' from the App Setup section on the LHS



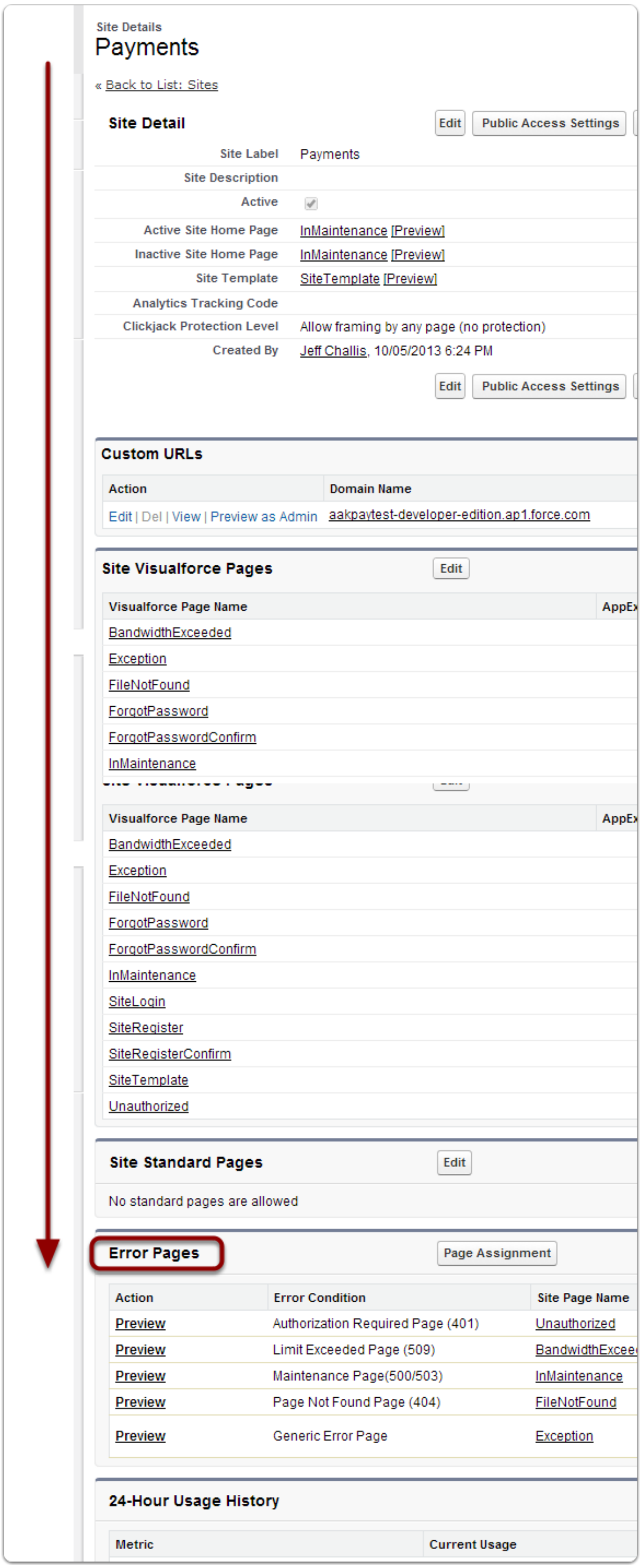
1.3 Select 'Sites'



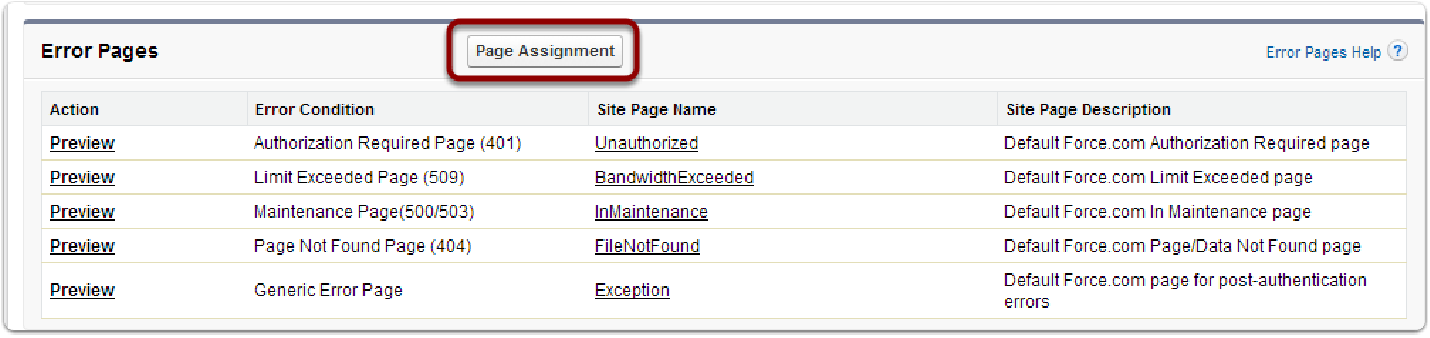
1.4 Select the Site from the list



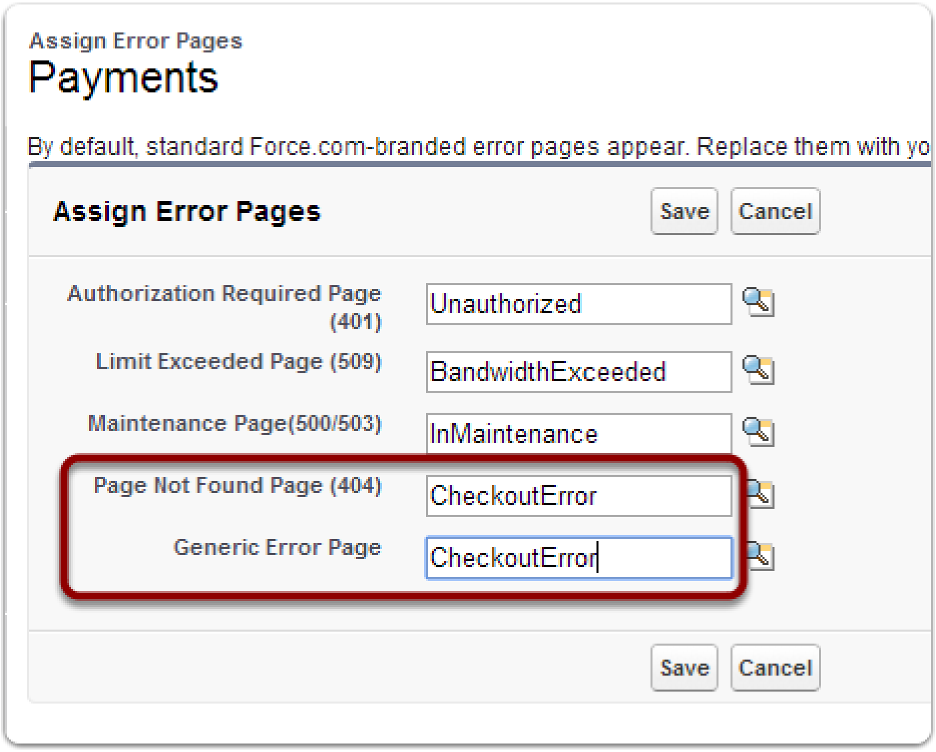
2. Scroll down the Site Details screen to the 'Error Pages'



2.1 Select the 'Page Assignment' button



2.2 Type 'checkoutError' for the two fields shown below



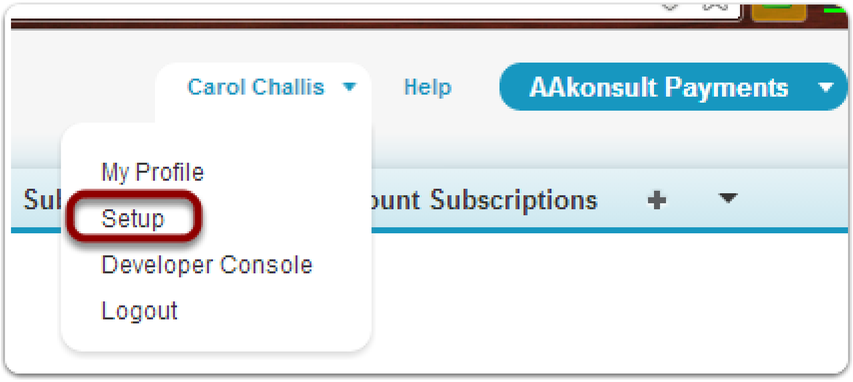
2.3 Select 'Save'

How to test your site

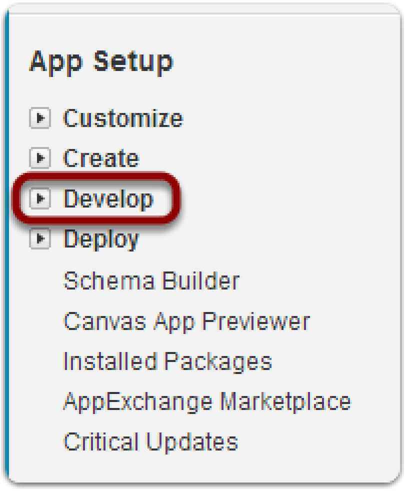
Enough details have now been setup to enable your site to run in a test mode. You won't be able to do make transactions until you have completed the Merchant Account facility.

1. Navigate to the Site Detail page (Setup > Develop > Sites)

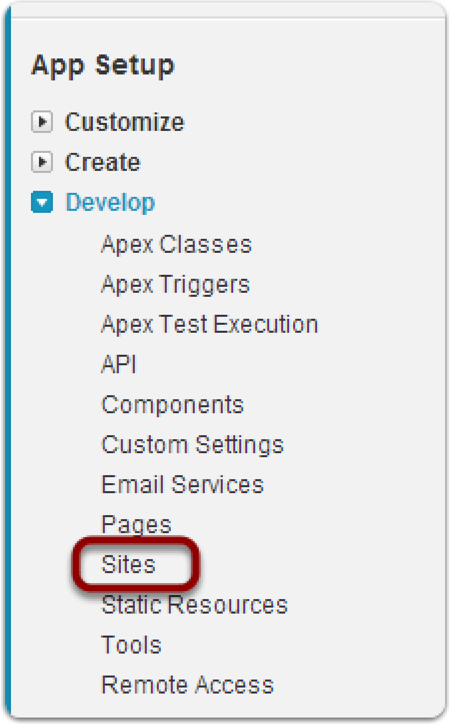
1.1 Select 'Setup' on the RHS of your Salesforce home screen



1.2 Select 'Develop' from the App Setup section on the LHS



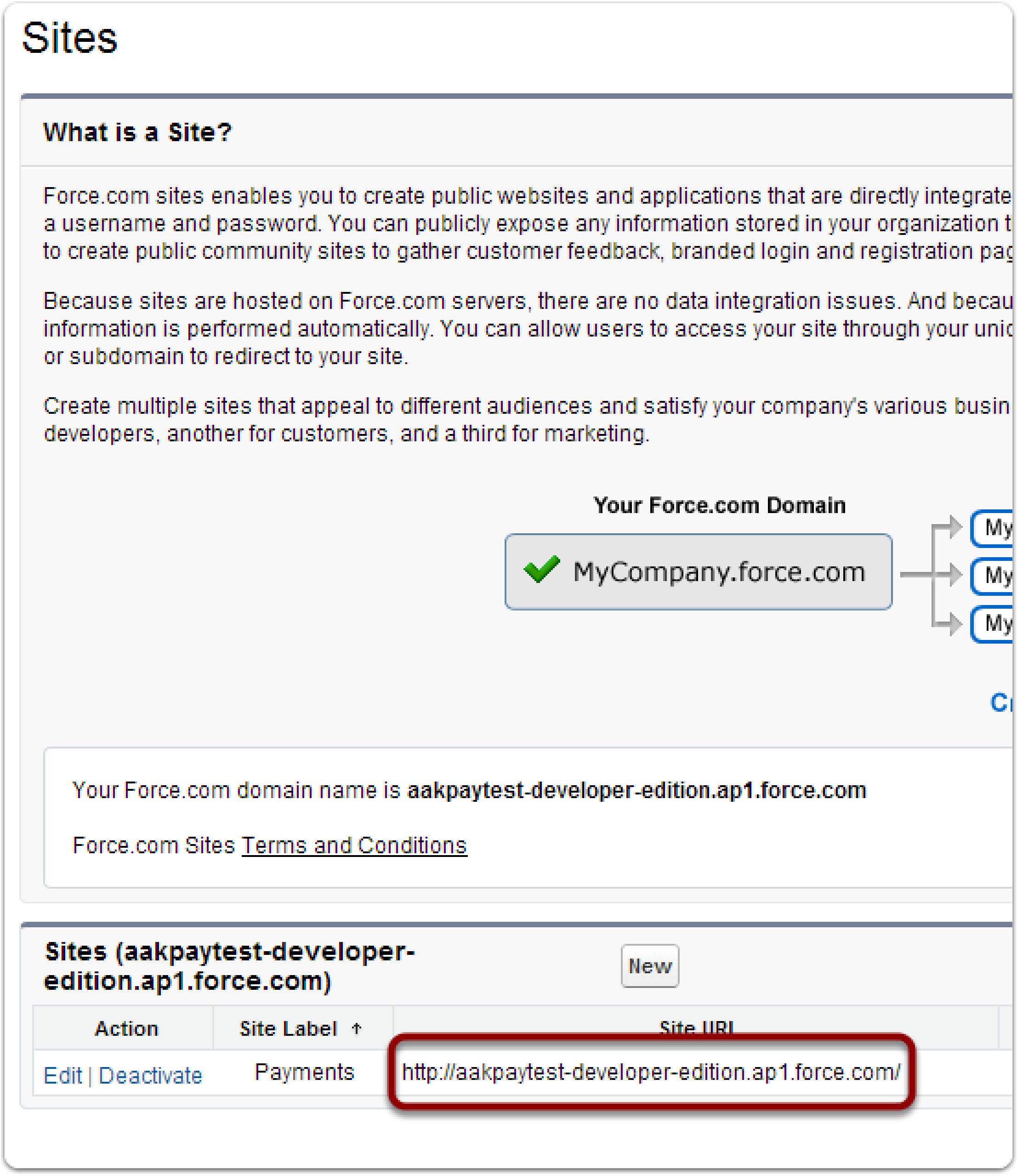
1.3 Select 'Sites'



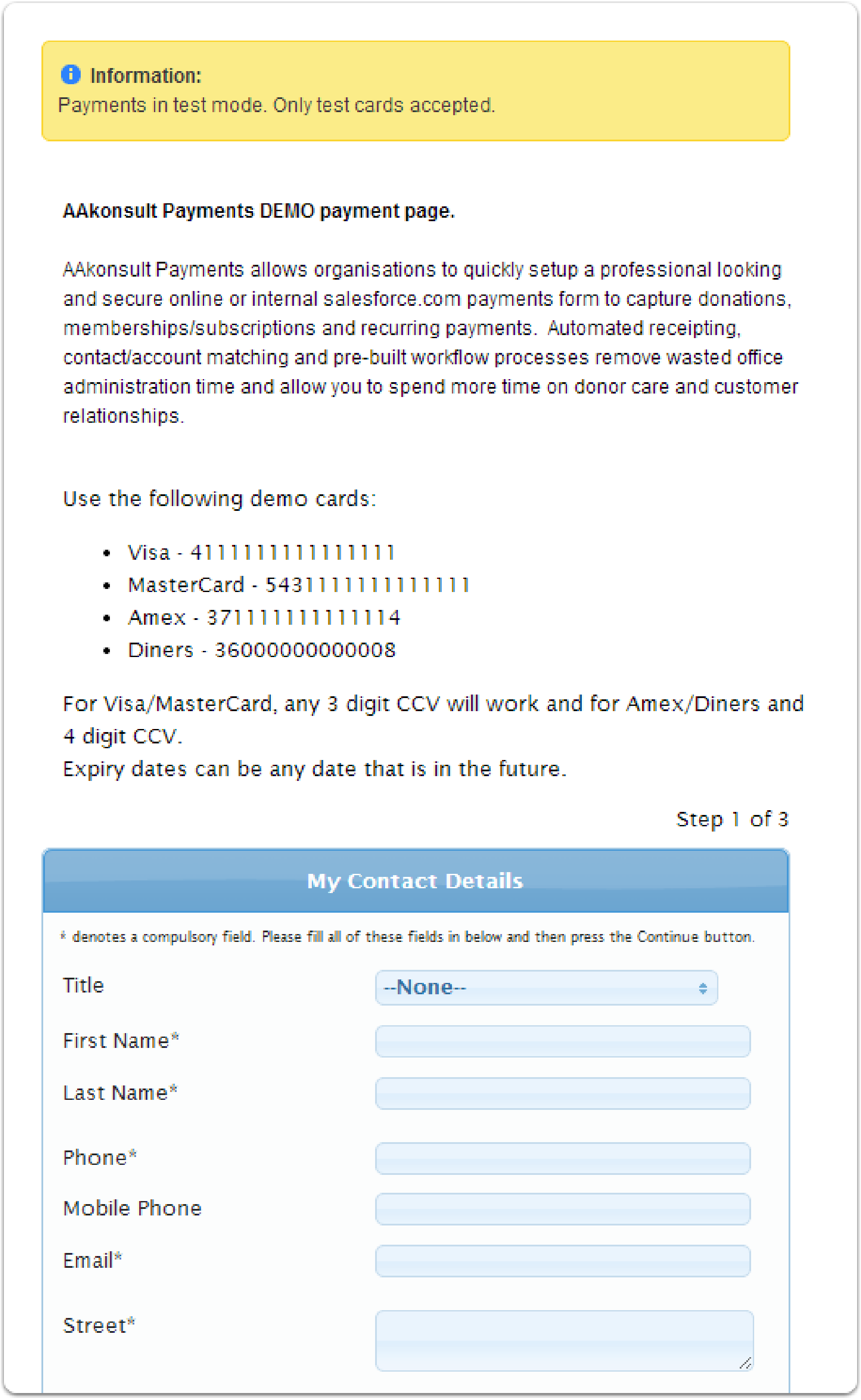
2. Click on the Site URL from the list

You may have more than one URL to choose from.

Select the URL that provides a secure service. For example: **https**



3. Confirm that your site is in operation.



Information:
Payments in test mode. Only test cards accepted.

AAkonsult Payments DEMO payment page.

AAkonsult Payments allows organisations to quickly setup a professional looking and secure online or internal salesforce.com payments form to capture donations, memberships/subscriptions and recurring payments. Automated receipting, contact/account matching and pre-built workflow processes remove wasted office administration time and allow you to spend more time on donor care and customer relationships.

Use the following demo cards:

- Visa - 4111111111111111
- MasterCard - 5431111111111111
- Amex - 371111111111114
- Diners - 36000000000008

For Visa/MasterCard, any 3 digit CCV will work and for Amex/Diners and 4 digit CCV.
Expiry dates can be any date that is in the future.

Step 1 of 3

My Contact Details

* denotes a compulsory field. Please fill all of these fields in below and then press the Continue button.

Title --None--
First Name*
Last Name*
Phone*
Mobile Phone
Email*
Street*

3.1 Check the steps in this manual if your site does not load or you receive an error message.

If you do not see a similar screenshot to above, then your package may not have been deployed. Check the AppExchange section earlier in this manual.

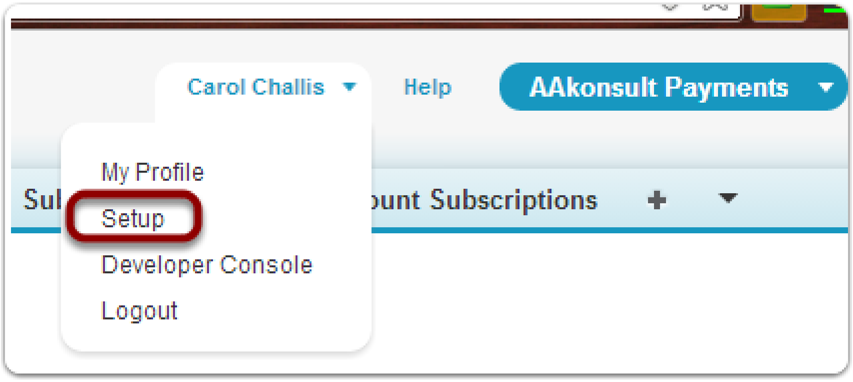
How to connect your new site to your Merchant Facility

To obtain an eCommerce Merchant Facility, follow 'How to set up a Merchant Facility'.

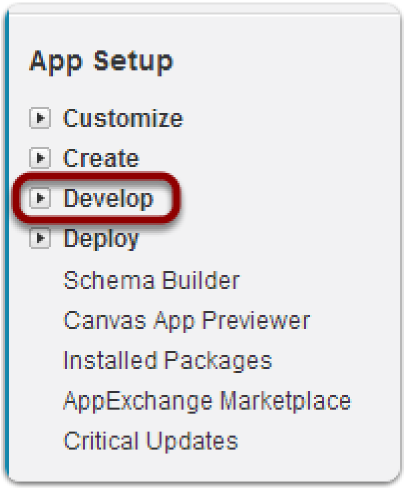
NOTE: This may take a few weeks.

1. Navigate to the Site Detail page (Setup > Develop > Sites)

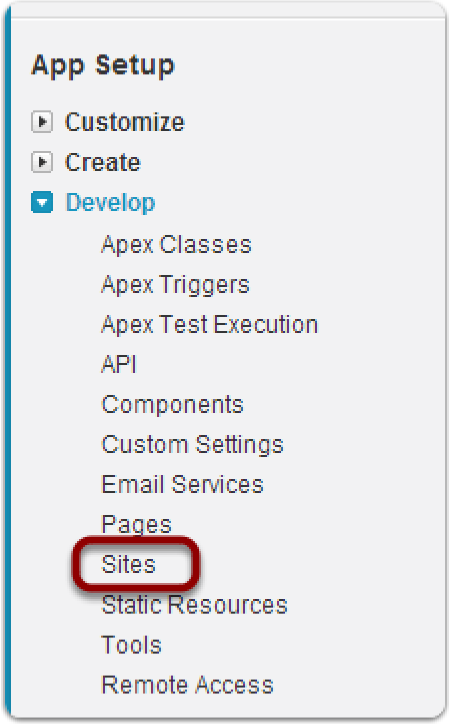
1.1 Select 'Setup' on the RHS of your Salesforce home screen



1.2 Select 'Develop' from the App Setup section on the LHS



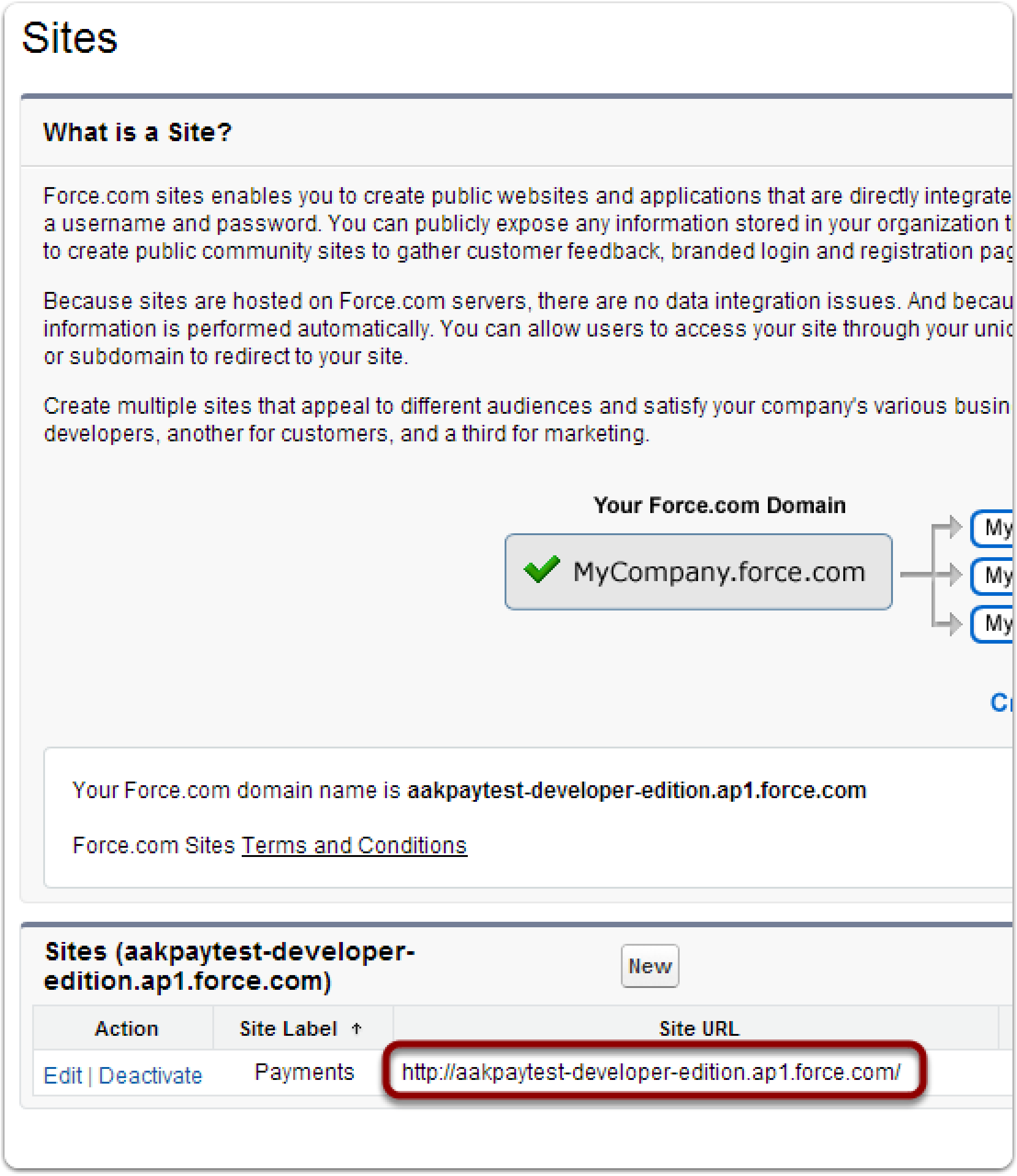
1.3 Select 'Sites'



2. Copy the secure URL of your site

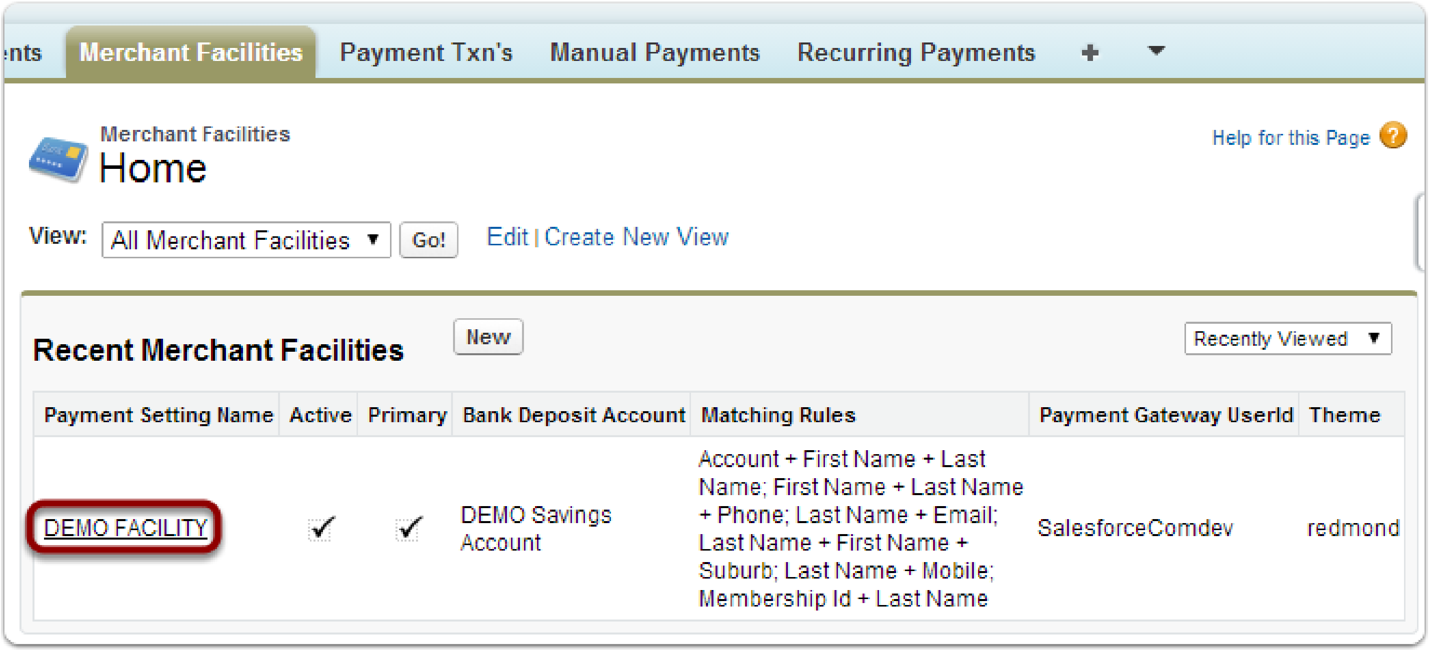
Copy shortcut - Highlight & Cntr C

Make sure you choose the **SECURE** URL (not shown below). A secure URL will begin with http**s**//



3. Navigate to the 'Merchant Facilities' tab

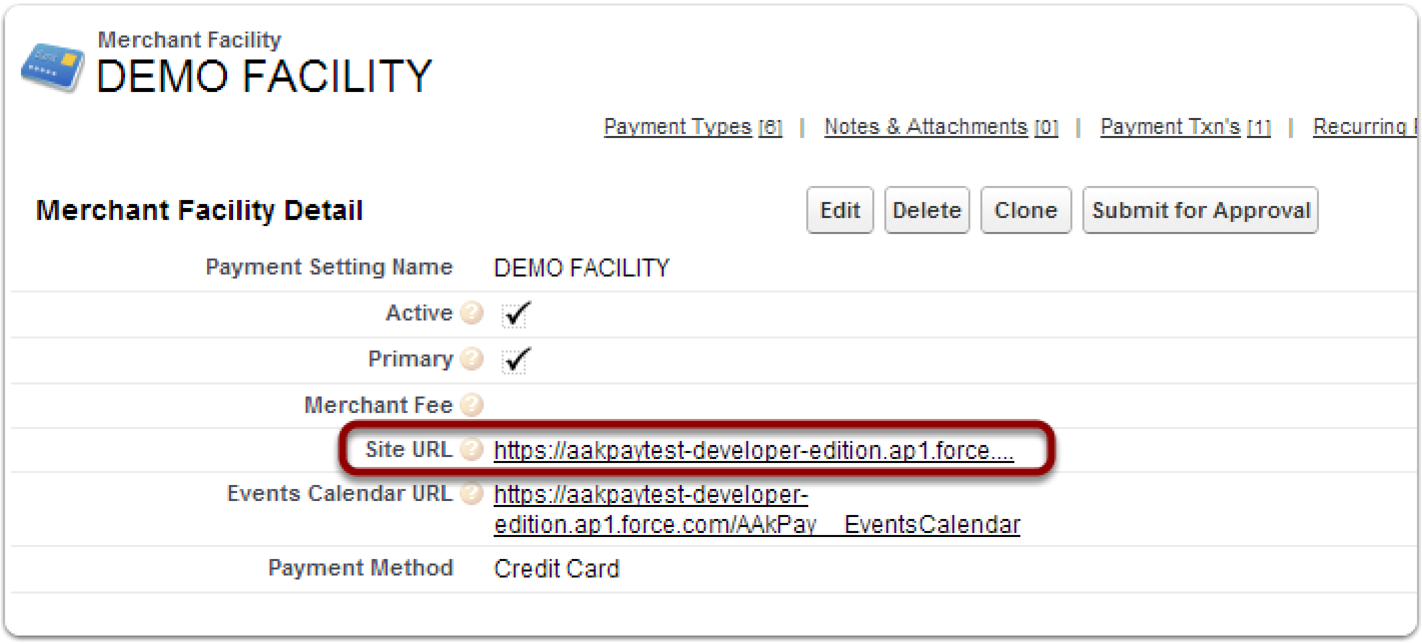
4. Select the Merchant Facility you wish to use



5. Select 'Edit'

6. Paste the site URL into the field 'Site URL'

Paste shortcut - Ctrl V



7. Select 'Save'

How to add a custom URL - Optional

Should you wish to make the URL shown to payees more custom to match your domain or branding, then you can add a custom domain.

It can use useful to use custom domains/URL's when sending out emails or SMS/Text's with links in them. For SMS/Text's, this is particularly important as this provides a way of having a shorter URL.

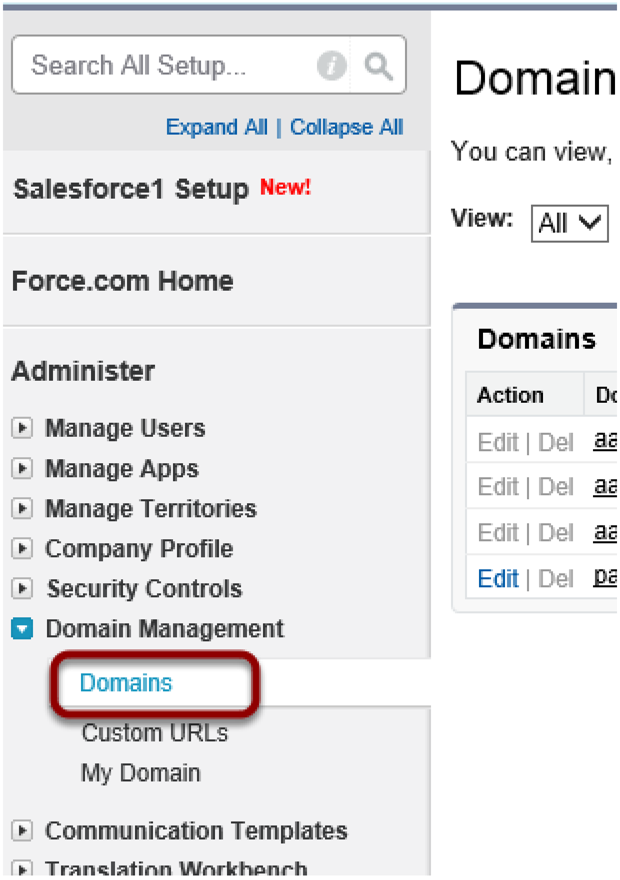
An example of a custom URL is pay.aakonsultpayments.com (vs. the default of https://aakonsultpayments.secure.force.com

Before starting this section, you will need to ensure you have access to your website domain management

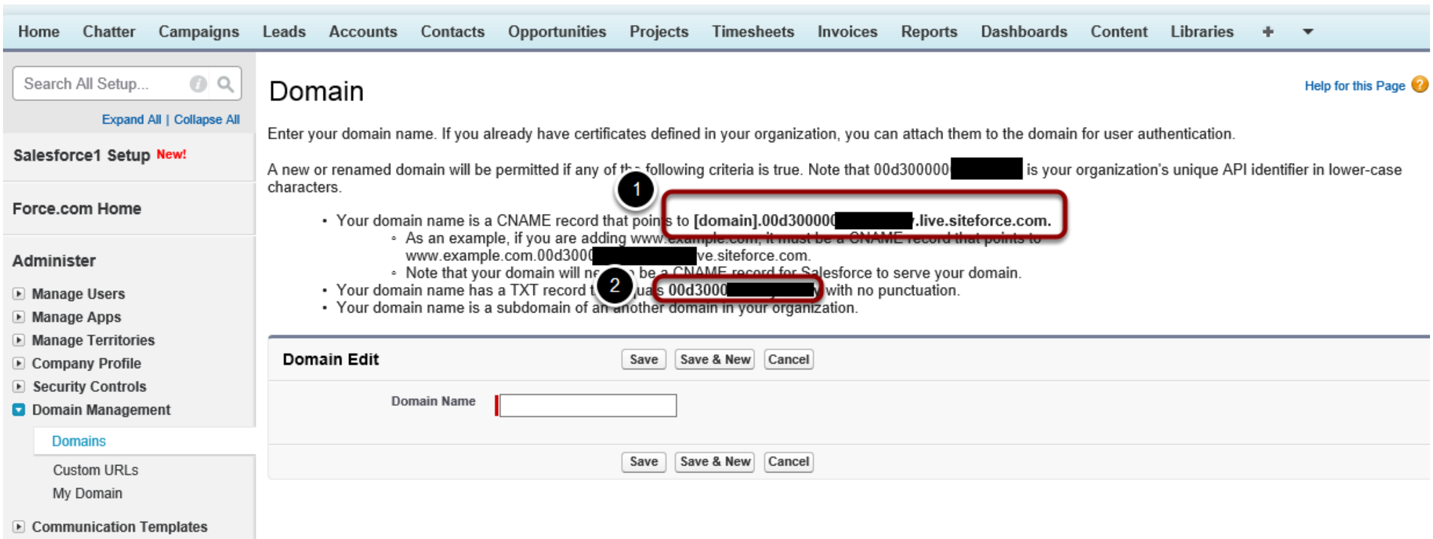
Quick Steps:

1. Setup > domain management - add a new domain
2. From step 1, note details and login to your domain management and apply
3. Enter domain in domain management - add a new domain - Save
4. Link domain to your site - setup > domain management > custom URL
5. Optionally, add a new formula field to URL Token. Formula is based on: "https://pay.mydomain.com/U/"&AAkPay__Tiny_Token__c

1. Setup > Administration > Domain Management



2. Add Domain



Please note and read the instructions as detailed here. You will need to copy these details and use them in the next step. Keep this screen in Salesforce open as you will need to come back to here in step 3.

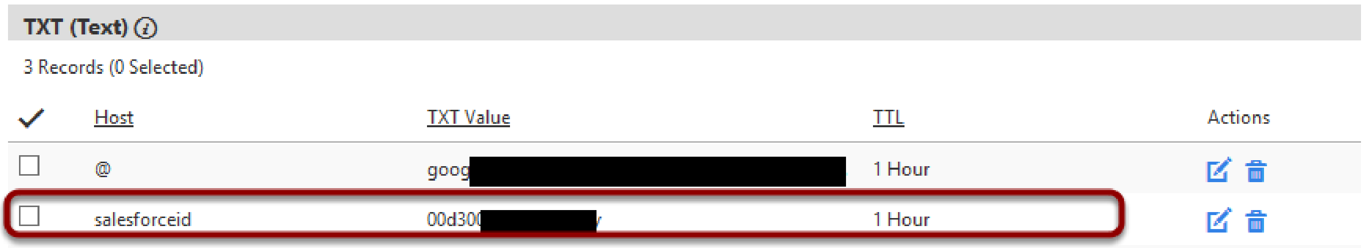
3. Add CNAME and Text records

To do these steps, you will need to be an administrator of your domain. As each providers is different, please check with your provider for exact instructions

3.1 Add CNAME record

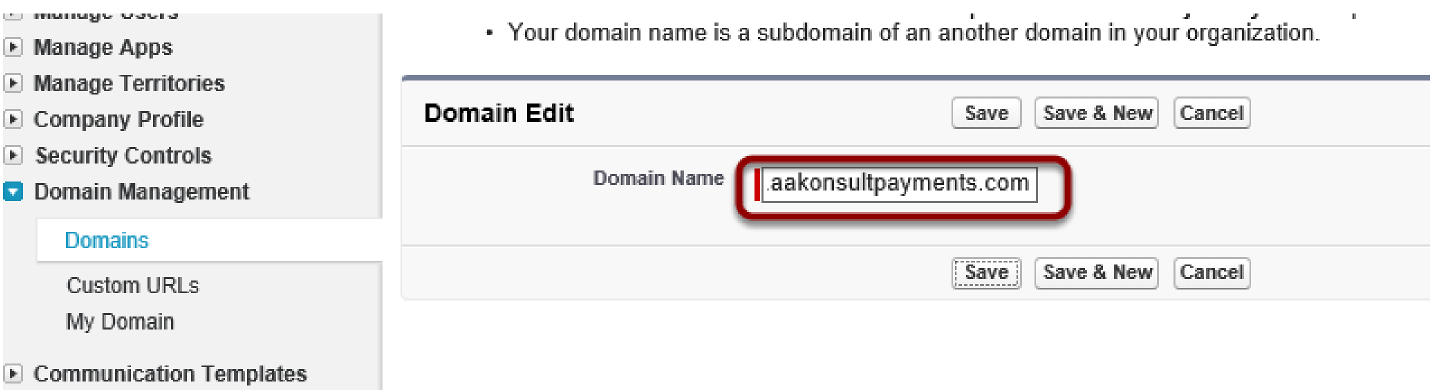
For our example domain, we are choosing to use pay.aakonsultpayments.com. We have copied the sample given is step 2, point (1) and replaced [domain] with the one we wish to use.

3.2 Add text record



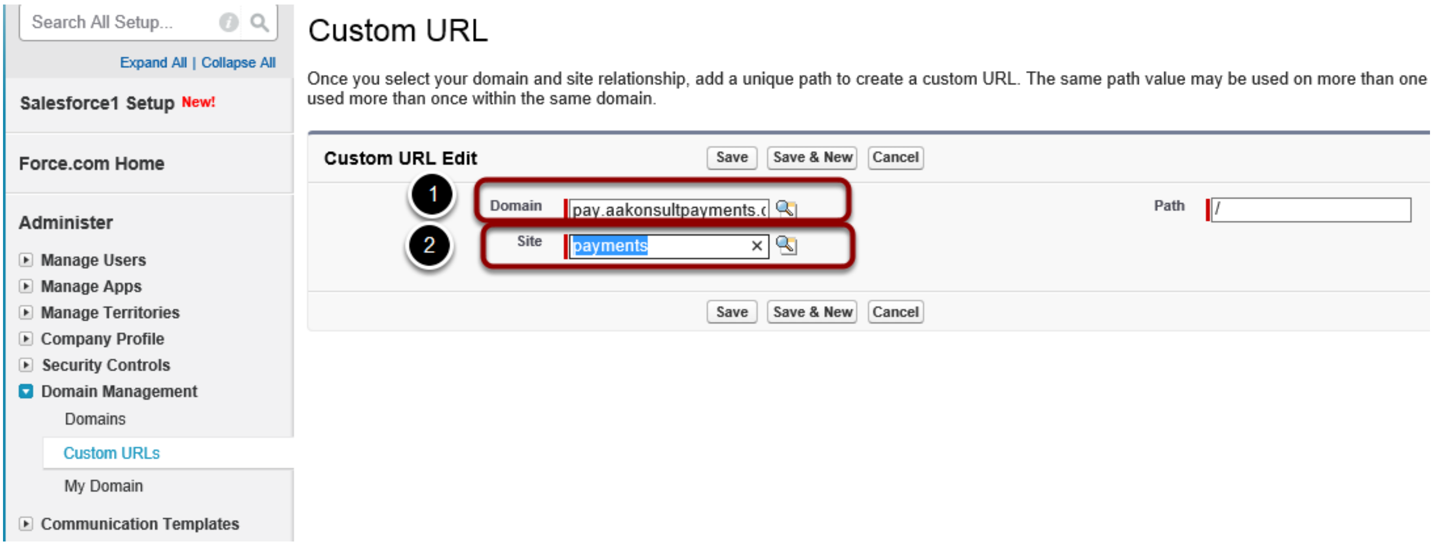
Copy the id as shown is step 2, point (2) and paste into the text value.

4. Add the domain to Salesforce



Navigate back to the tab that was opened in step 2, enter your domain name and press save. Please note, the CNAME records in step 3 make take upto 24 hours before they become available.

5. Setup > Domain management > Custom URL: Link domain to custom URL and site



Link the domain created in step 4 to the Site that was created when setting up Force.com sites.

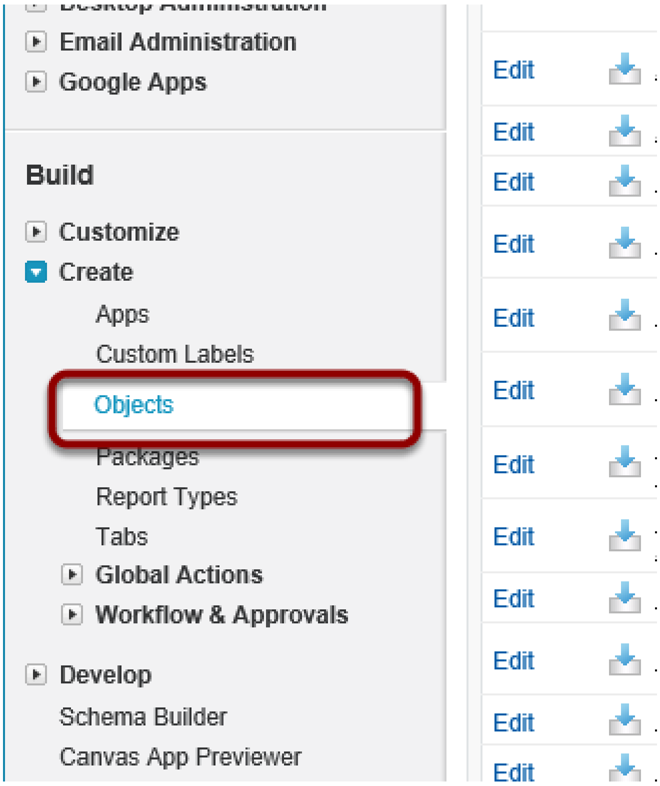
Your new URL is now ready to use.

6. URL Token - Short URL

Optional step:

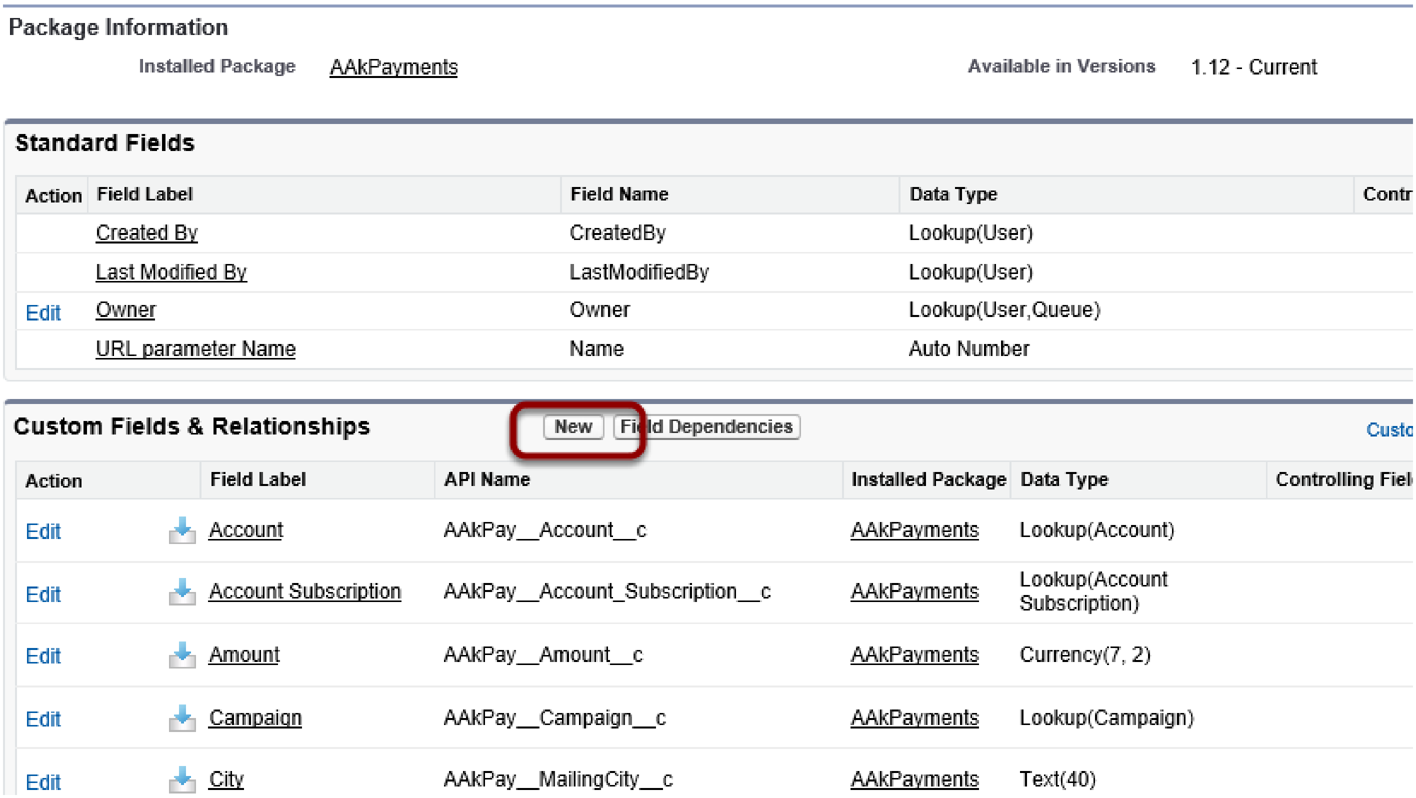
It is useful to have a URL field created on the URL Token for use with email merges or SMS/Text Message merge.

6.1 Setup > Create > Custom Objects. URL Tokens



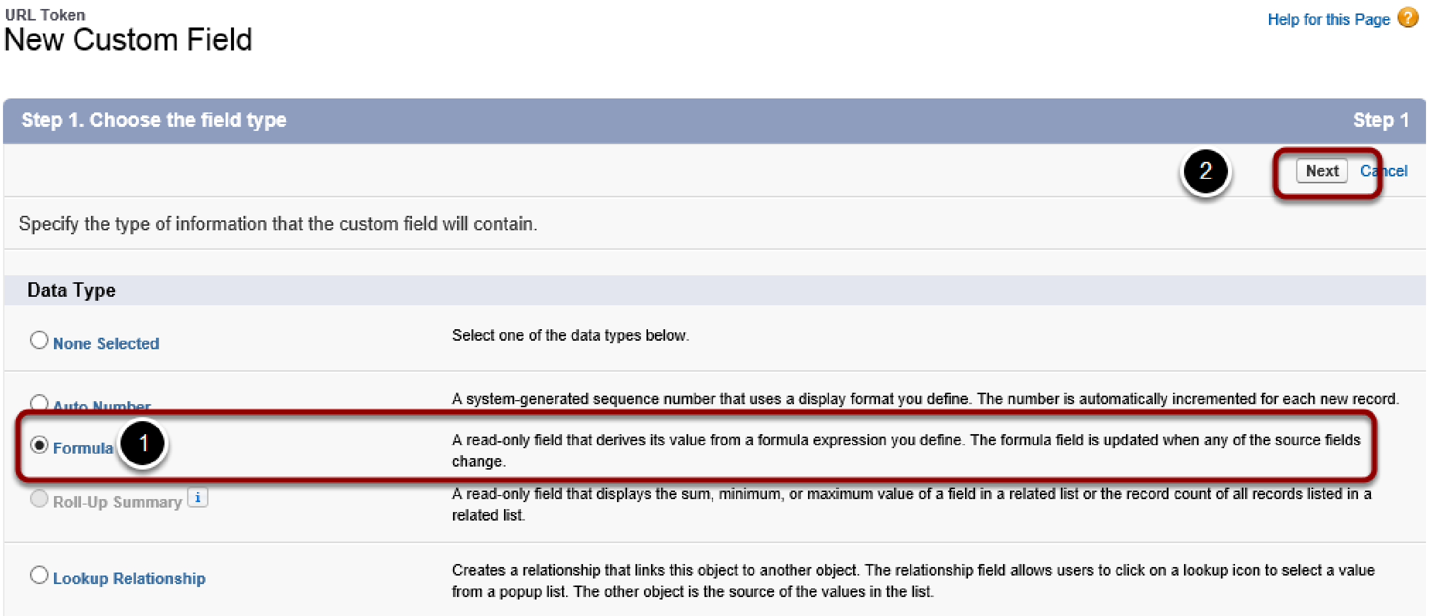
After navigating to setup > Create > Custom Objects. Click on the "URL Token" object.

6.2 Add a new field

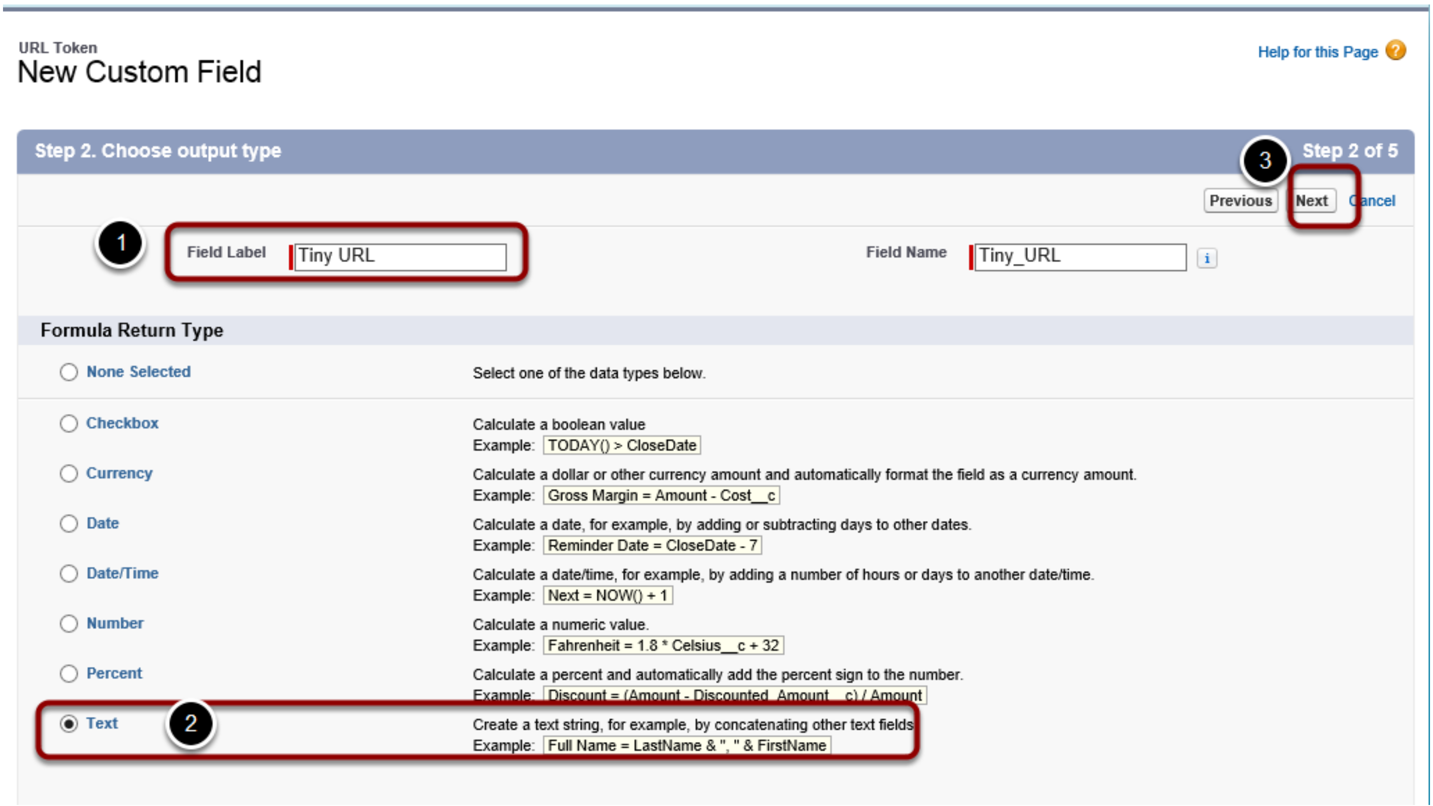


Scroll down to the Custom Fields & Relationships section. Then press the New button

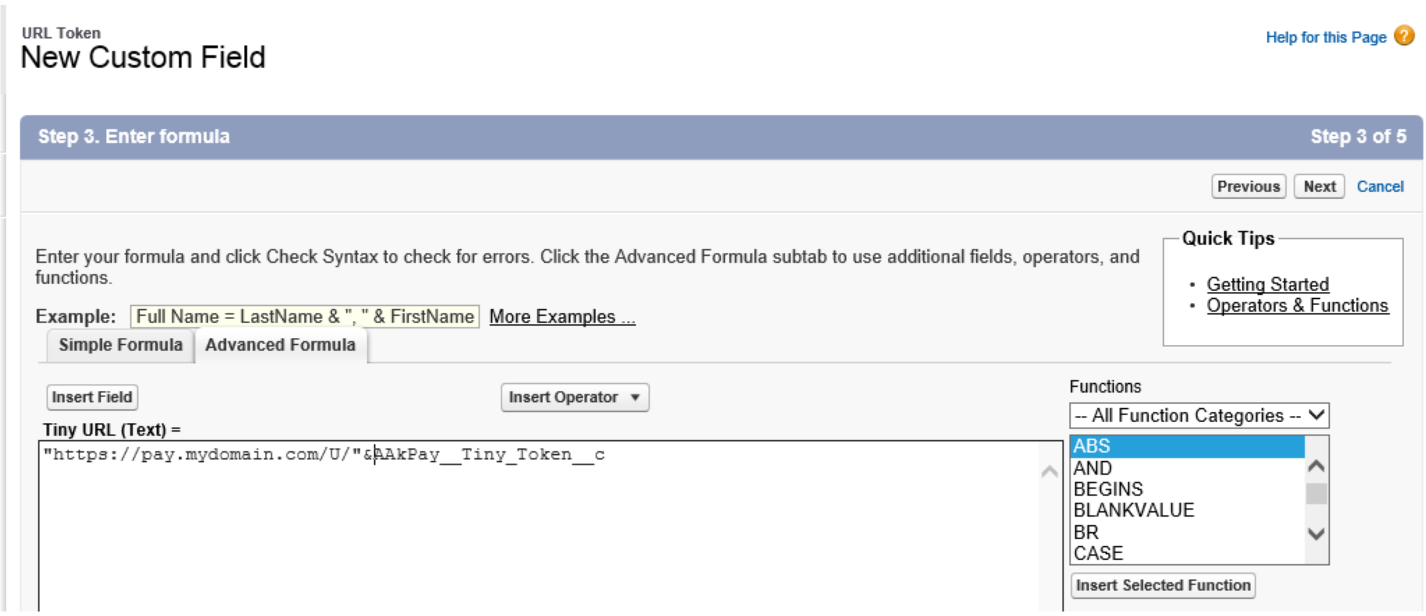
6.3 Select Type formula



6.4 Add name and select type text



6.5 Add formula



Add the formula "https://pay.mydomain.com/U/"&AAkPay__Tiny_Token__c

Make sure you replace "pay.mydomain.com" with your domain as setup in steps 2 through 5 above.

Press NEXT

Continue through the new field wizard keeping the defaults shown upto and including the SAVE step.

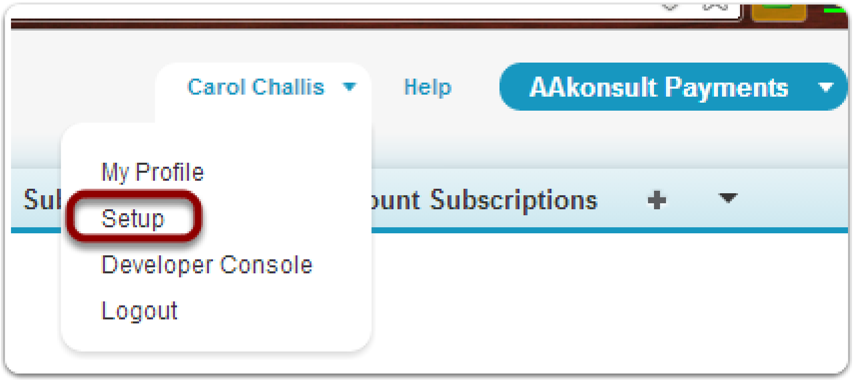
Security

How to set up external site security (older version)

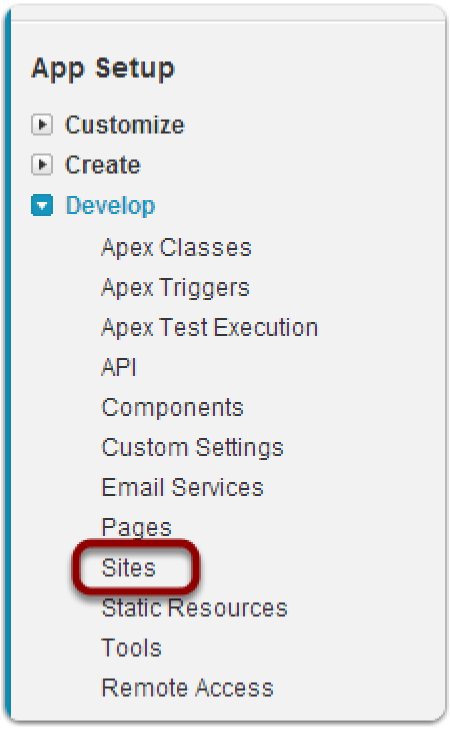
How you set up security will depend on the needs of your organisation.

1. Navigate to the Site Detail page (Setup > Develop > Sites)

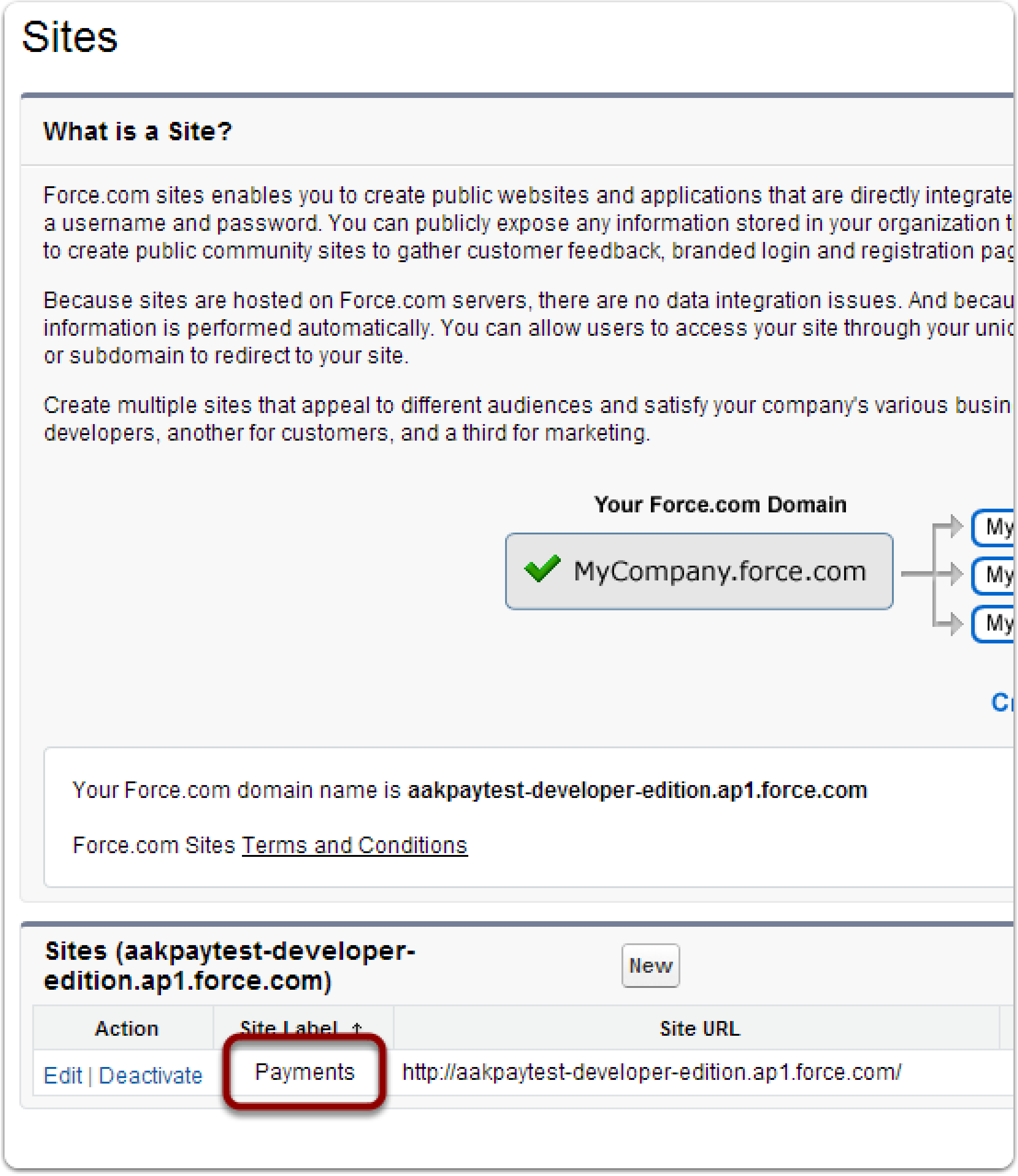
1.1 Select 'Setup' on the RHS of your Salesforce home screen



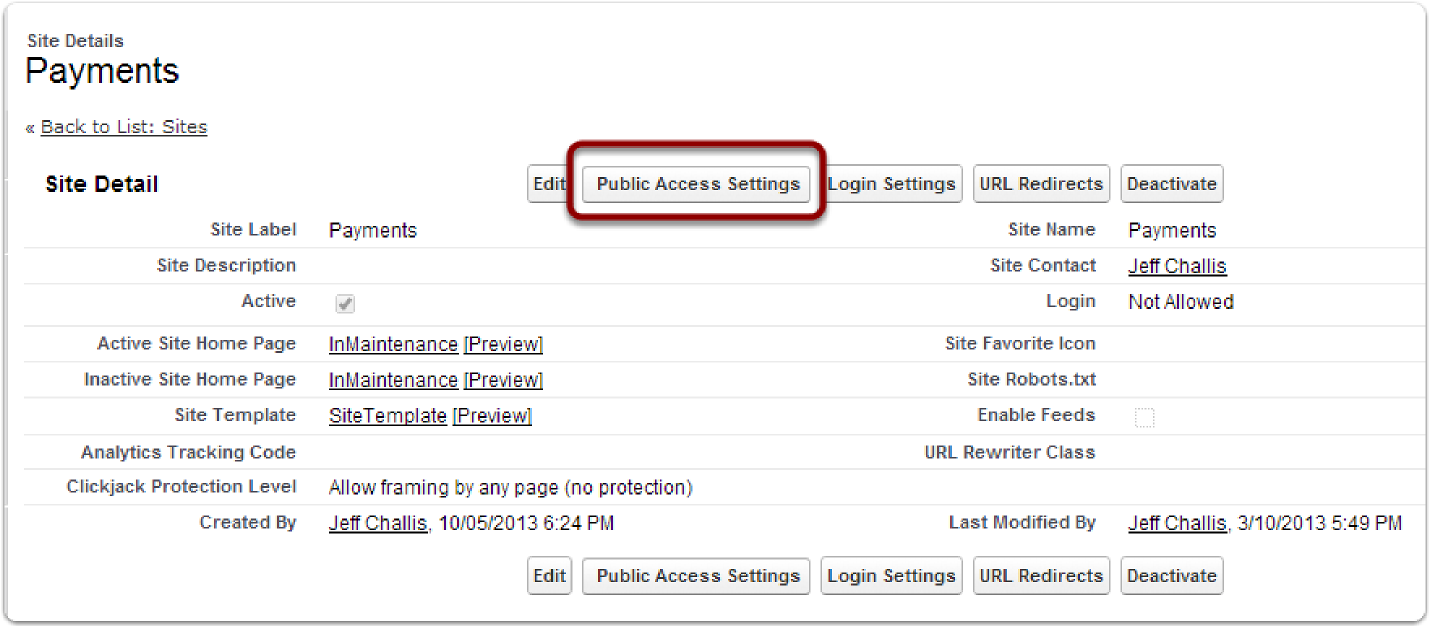
1.2 Select 'Sites' from the 'Develop' menu



1.3 Select the Site from the list



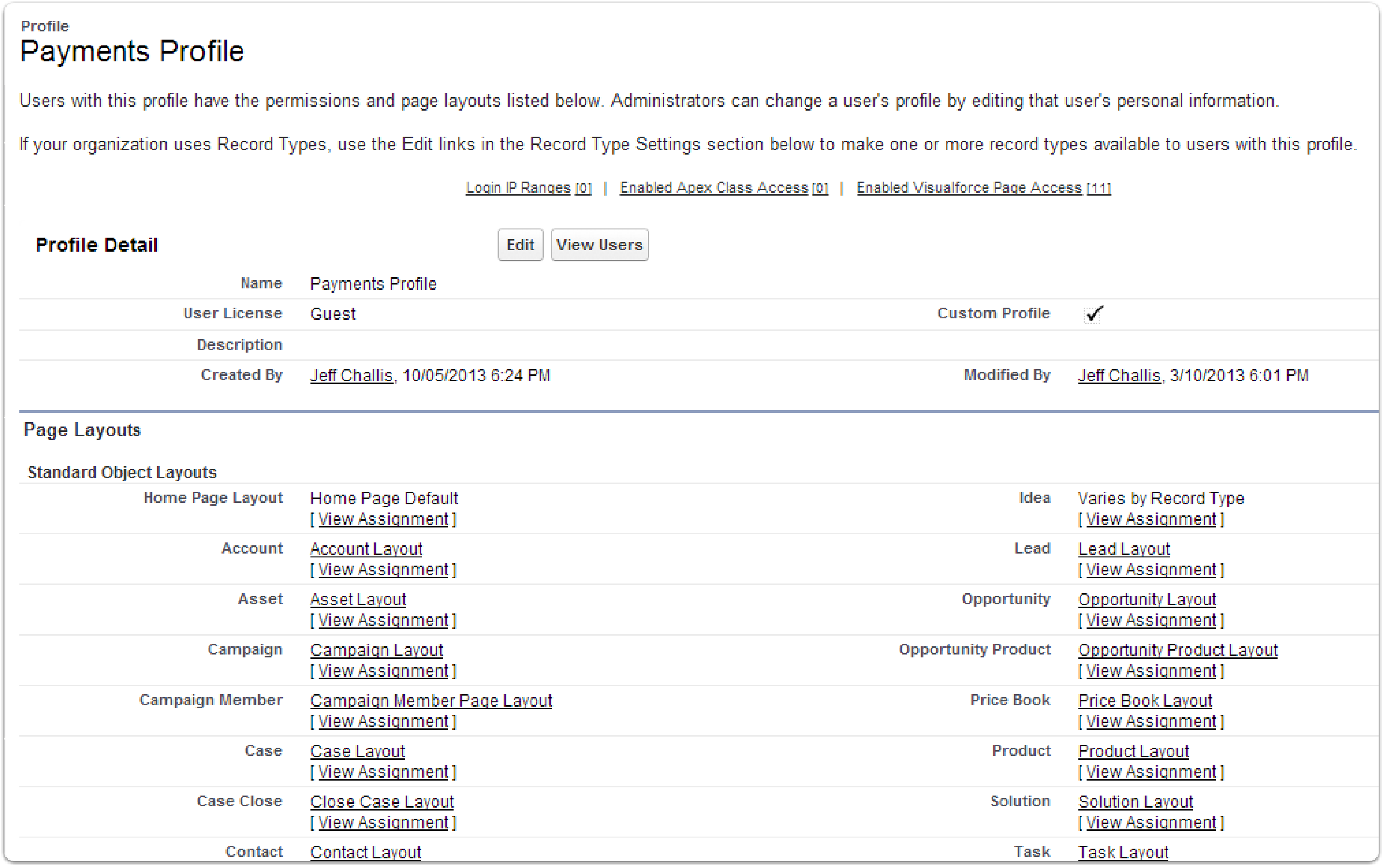
2. Select the 'Public Access Settings' button



3. Check the diagram below. If it looks the same, follow these steps:

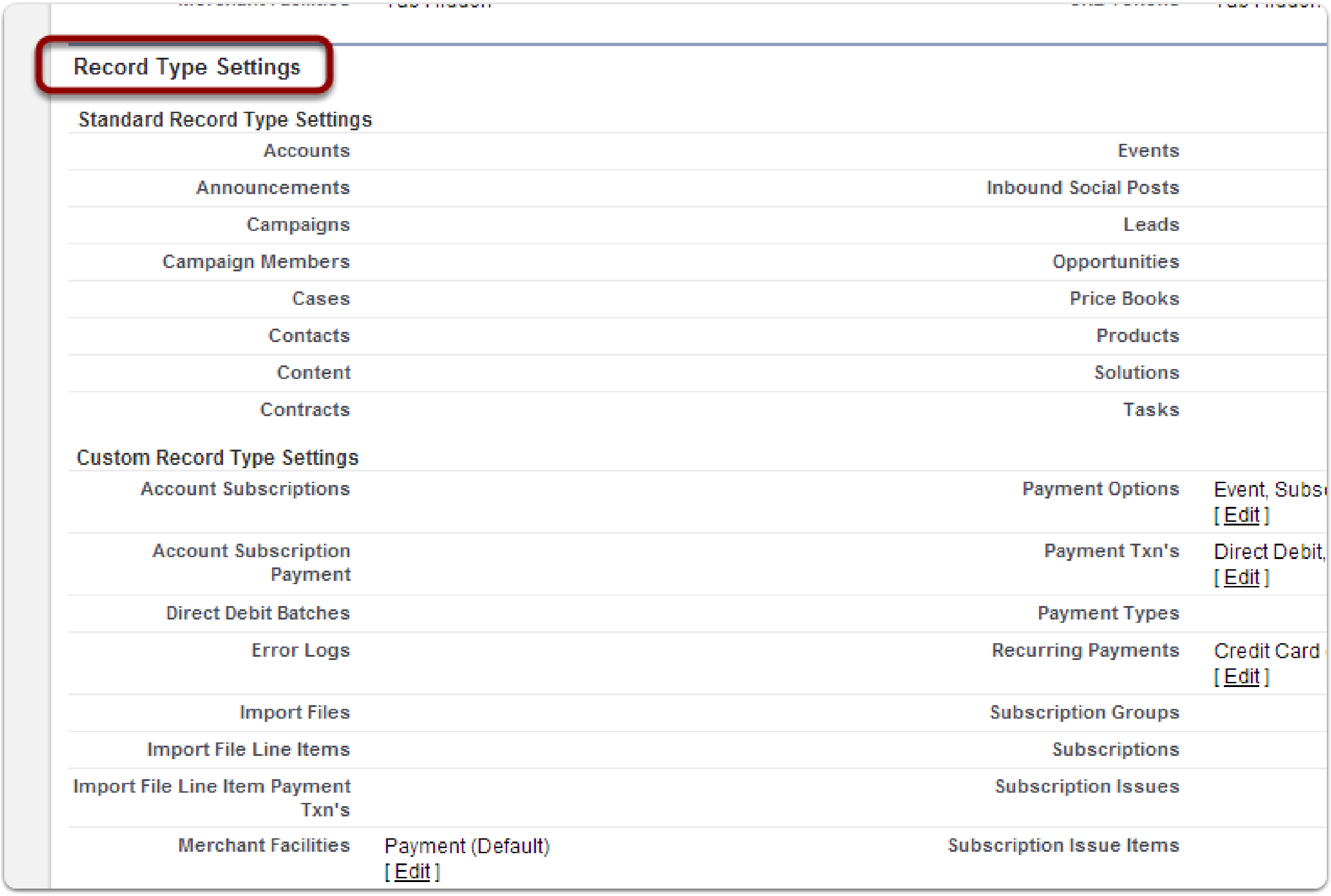
These instructions are for older versions of Salesforce.

If the diagram does not match below, follow these instructions (enhanced version of Salesforce) to revert Salesforce back to the older version.

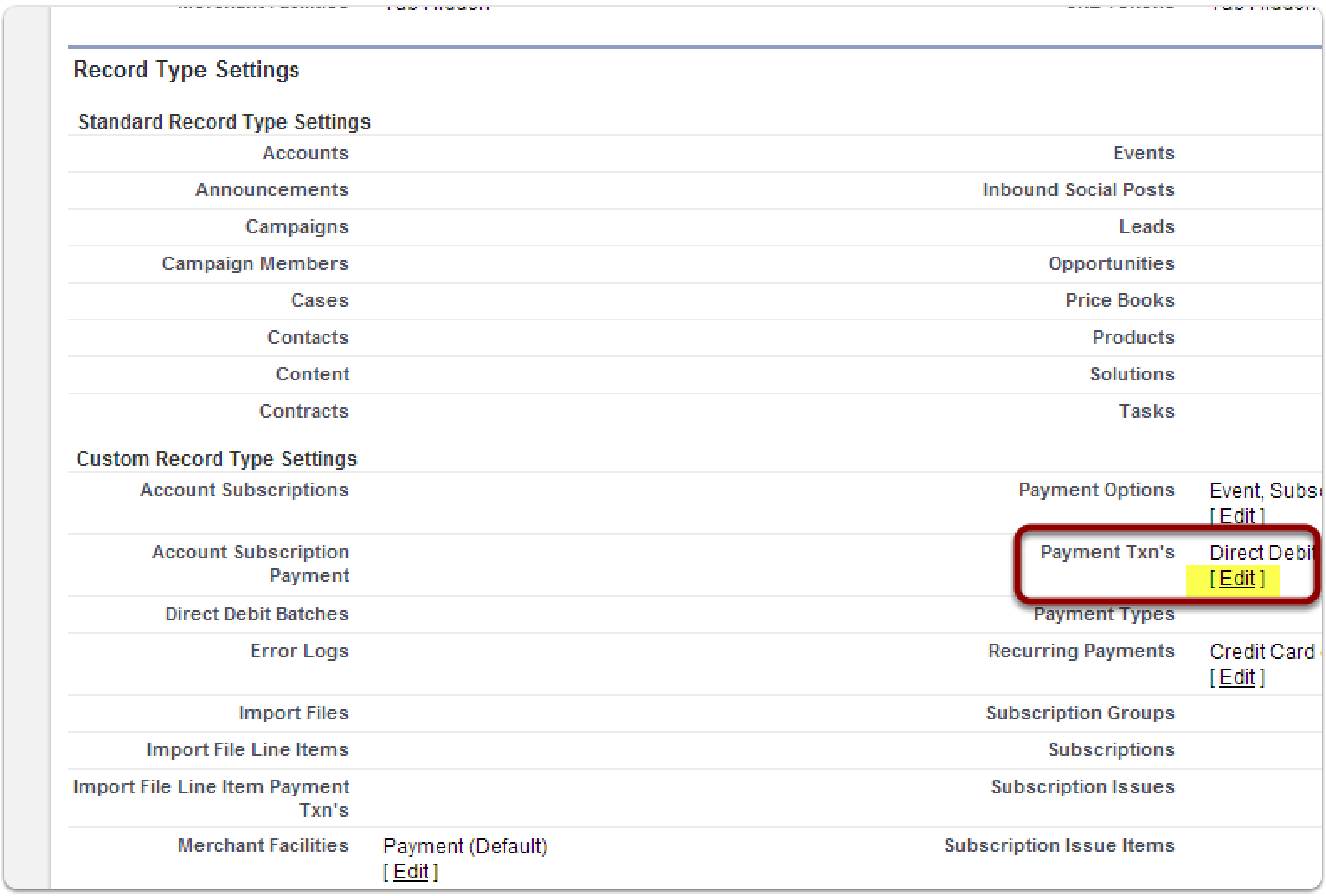


4. Set 'Record Types'.

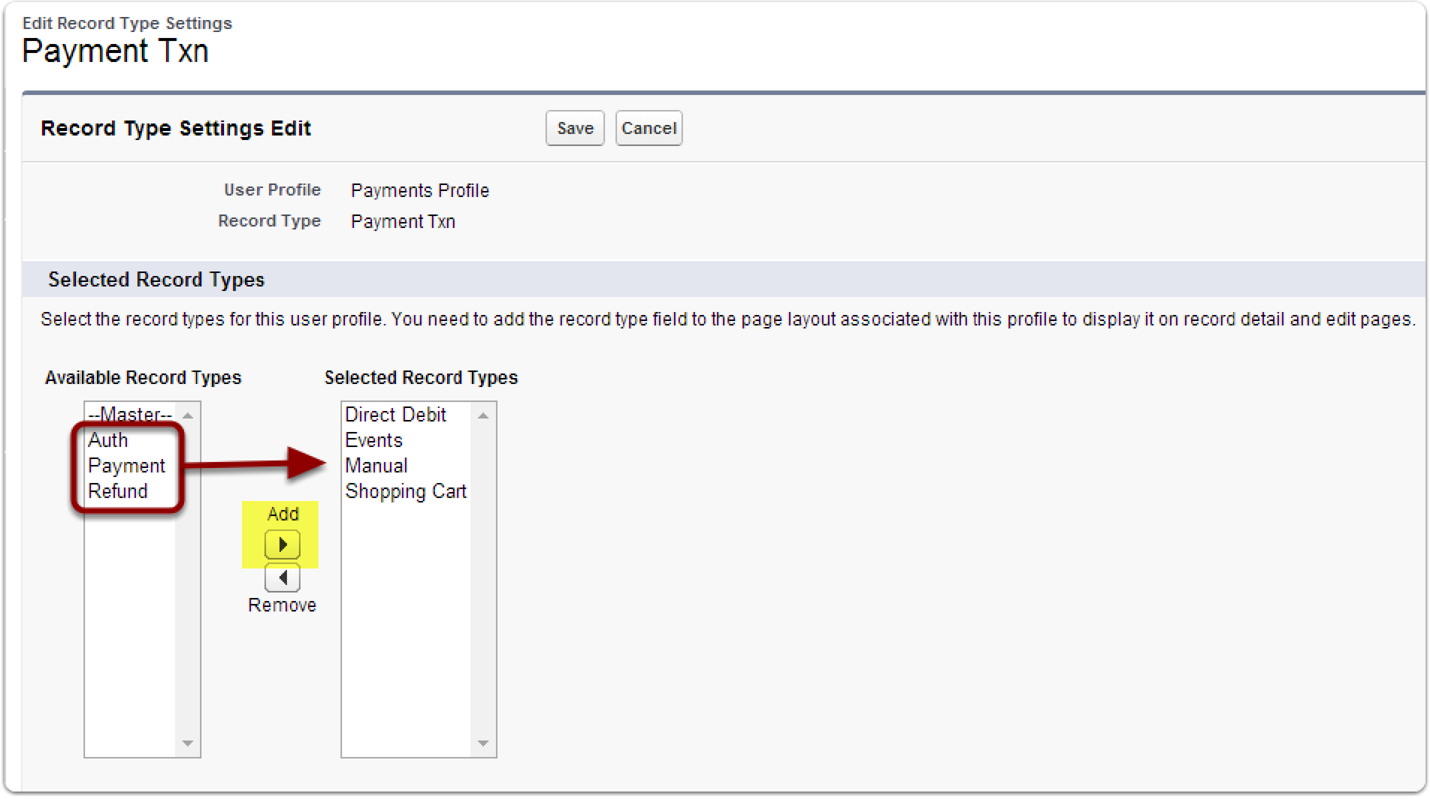
4.1 Scroll down to 'Record Type Settings' heading



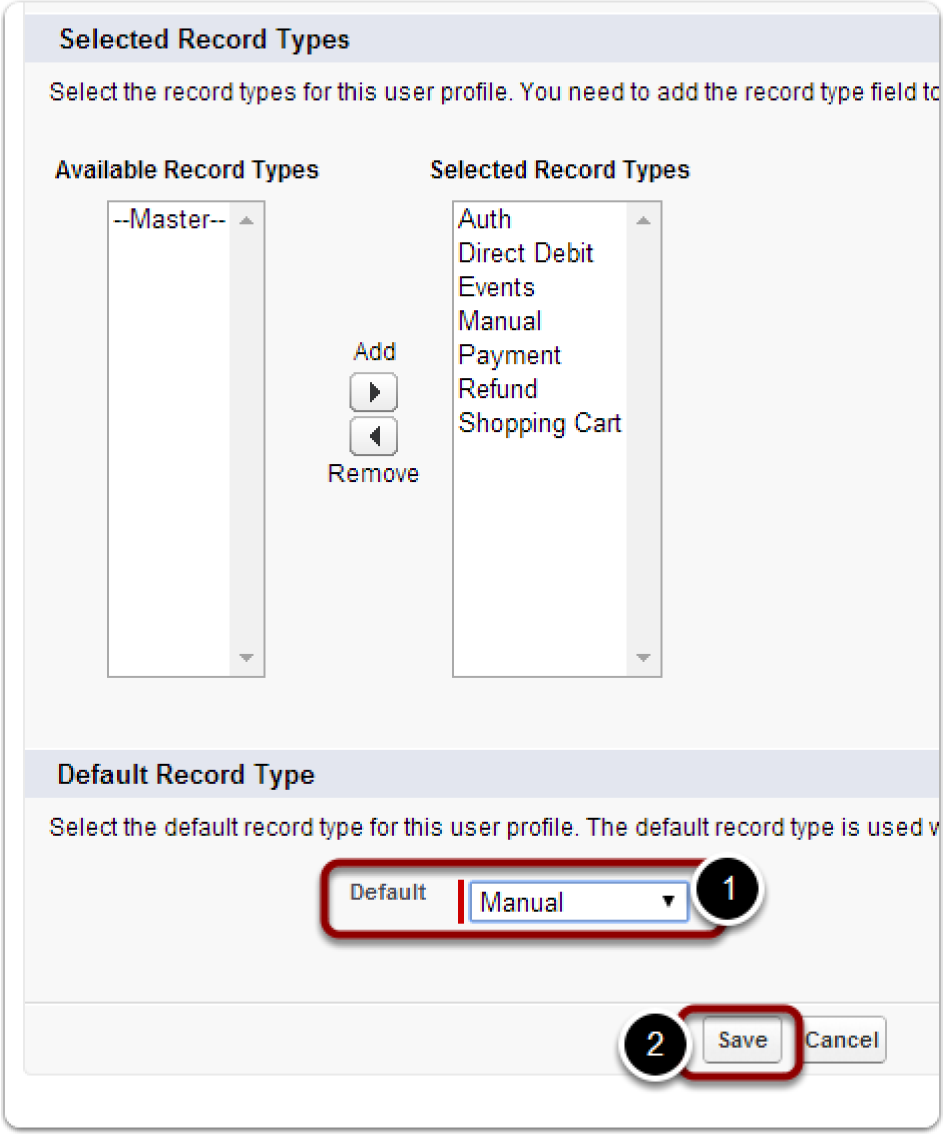
4.2 Select 'Edit' on the Payment Txn's label



4.3 Select all 'Available Record Types' to add them to 'Selected Record Types'

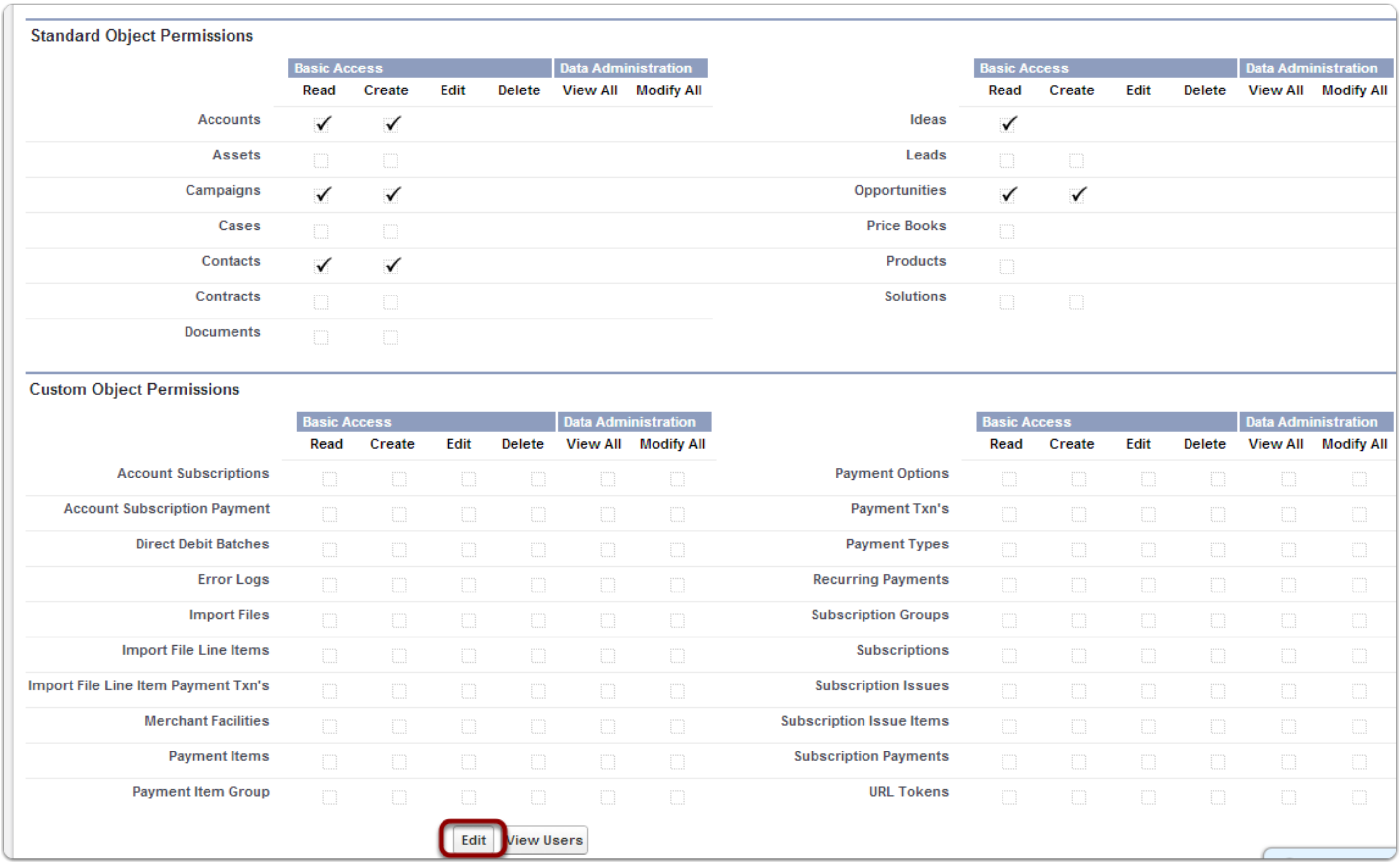


4.4 Set the 'Default Record Type' to Payment and Save.



5. Allocate Permissions.

5.1 Scroll down to 'Standard Object Permissions' on the Payment Profile screen.



Standard Object Permissions

	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Accounts	✓	✓					Ideas	✓					
Assets							Leads						
Campaigns	✓	✓					Opportunities	✓	✓				
Cases							Price Books						
Contacts	✓	✓					Products						
Contracts							Solutions						
Documents													

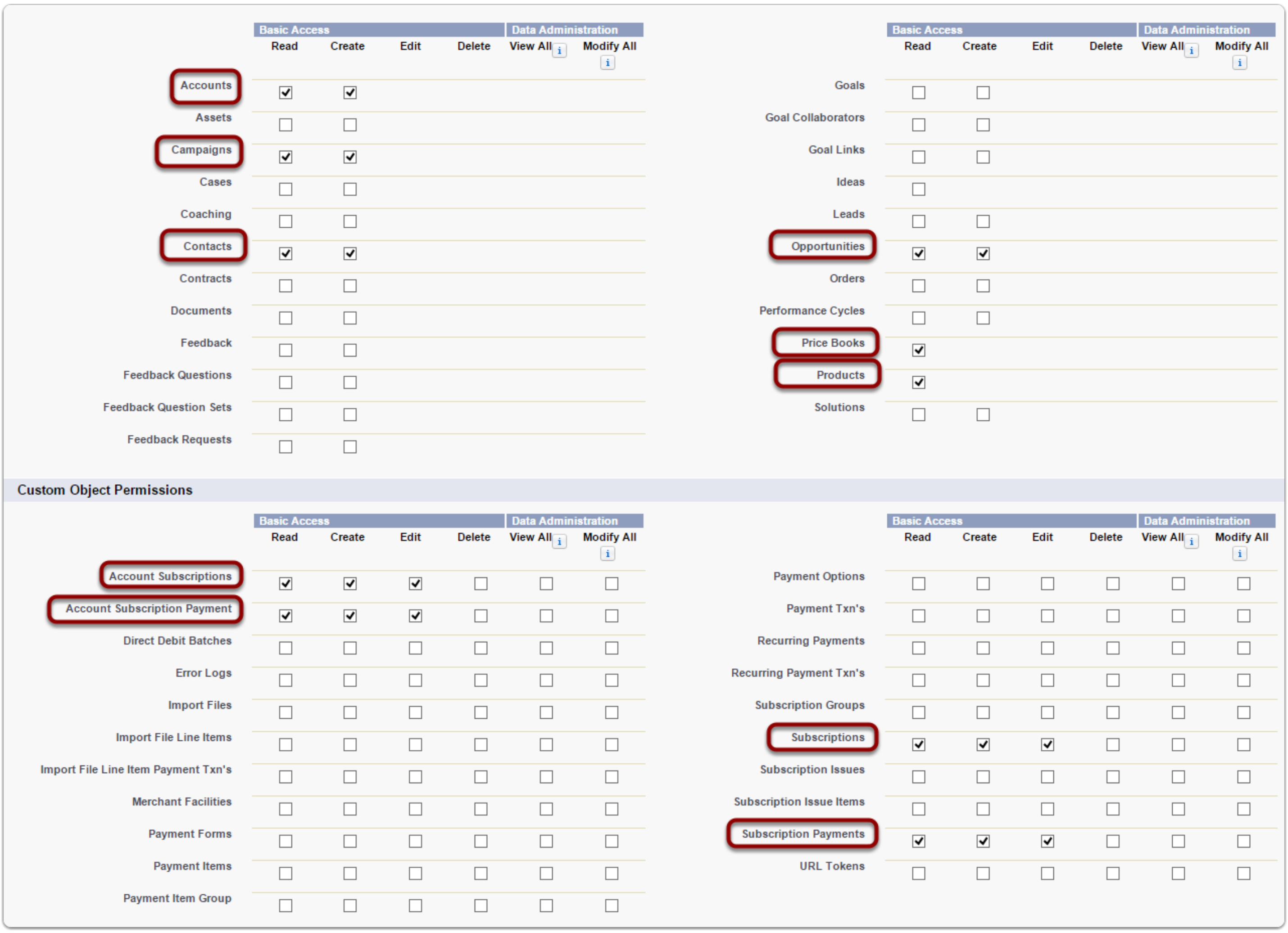
Custom Object Permissions

	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Account Subscriptions							Payment Options						
Account Subscription Payment							Payment Txn's						
Direct Debit Batches							Payment Types						
Error Logs							Recurring Payments						
Import Files							Subscription Groups						
Import File Line Items							Subscriptions						
Import File Line Item Payment Txn's							Subscription Issues						
Merchant Facilities							Subscription Issue Items						
Payment Items							Subscription Payments						
Payment Item Group							URL Tokens						

5.2 Select 'Edit'.

5.3 Match the permissions shown below.

You may need to scroll across to see all the diagram.



	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Accounts	☑	☑				
Assets	☐	☐				
Campaigns	☑	☑				
Cases	☐	☐				
Coaching	☐	☐				
Contacts	☑	☑				
Contracts	☐	☐				
Documents	☐	☐				
Feedback	☐	☐				
Feedback Questions	☐	☐				
Feedback Question Sets	☐	☐				
Feedback Requests	☐	☐				

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Goals	☐	☐				
Goal Collaborators	☐	☐				
Goal Links	☐	☐				
Ideas	☐					
Leads	☐	☐				
Opportunities	☑	☑				
Orders	☐	☐				
Performance Cycles	☐	☐				
Price Books	☑					
Products	☑					
Solutions	☐	☐				

Custom Object Permissions

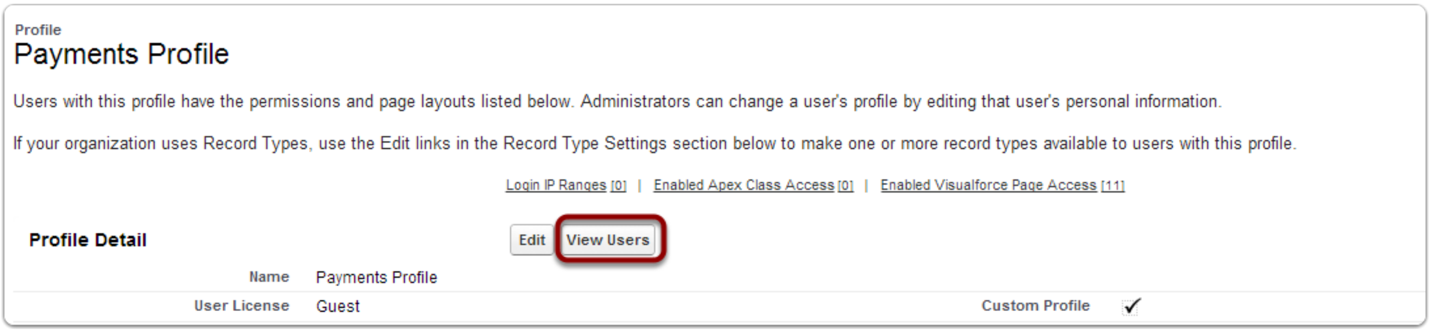
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Account Subscriptions	☑	☑	☑	☐	☐	☐
Account Subscription Payment	☑	☑	☑	☐	☐	☐
Direct Debit Batches	☐	☐	☐	☐	☐	☐
Error Logs	☐	☐	☐	☐	☐	☐
Import Files	☐	☐	☐	☐	☐	☐
Import File Line Items	☐	☐	☐	☐	☐	☐
Import File Line Item Payment Txn's	☐	☐	☐	☐	☐	☐
Merchant Facilities	☐	☐	☐	☐	☐	☐
Payment Forms	☐	☐	☐	☐	☐	☐
Payment Items	☐	☐	☐	☐	☐	☐
Payment Item Group	☐	☐	☐	☐	☐	☐

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Payment Options	☐	☐	☐	☐	☐	☐
Payment Txn's	☐	☐	☐	☐	☐	☐
Recurring Payments	☐	☐	☐	☐	☐	☐
Recurring Payment Txn's	☐	☐	☐	☐	☐	☐
Subscription Groups	☐	☐	☐	☐	☐	☐
Subscriptions	☑	☑	☑	☐	☐	☐
Subscription Issues	☐	☐	☐	☐	☐	☐
Subscription Issue Items	☐	☐	☐	☐	☐	☐
Subscription Payments	☑	☑	☑	☐	☐	☐
URL Tokens	☐	☐	☐	☐	☐	☐

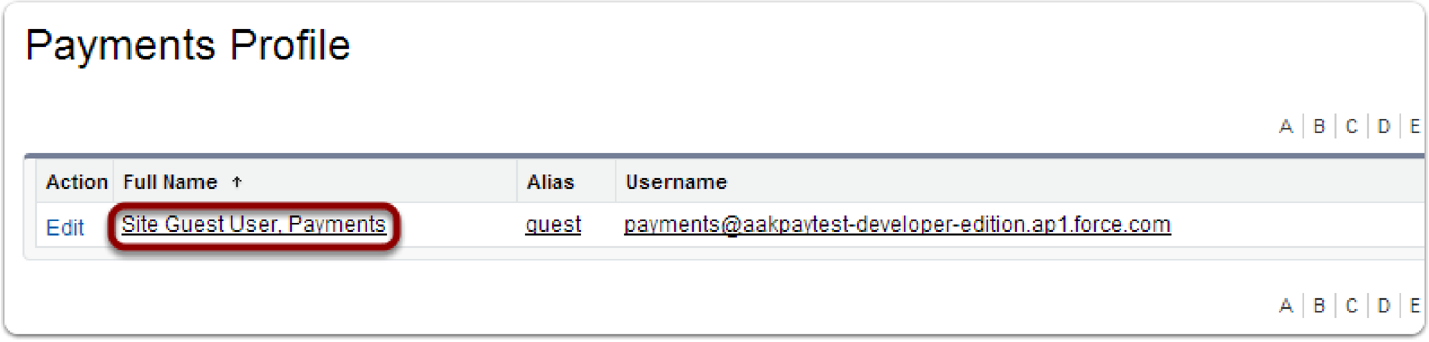
5.4 Select 'Save'.

6. Assign users.

6.1 Select 'View Users' on the Payments Profile screen.

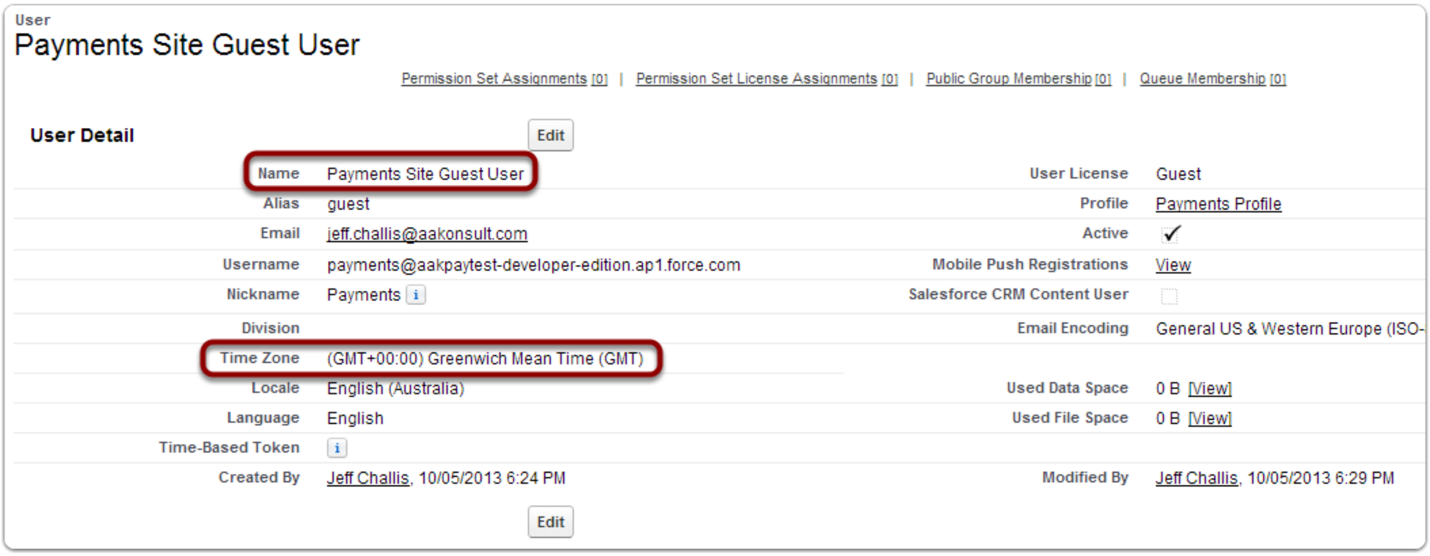


6.2 Select user to be assigned AAkonsult Payments access.

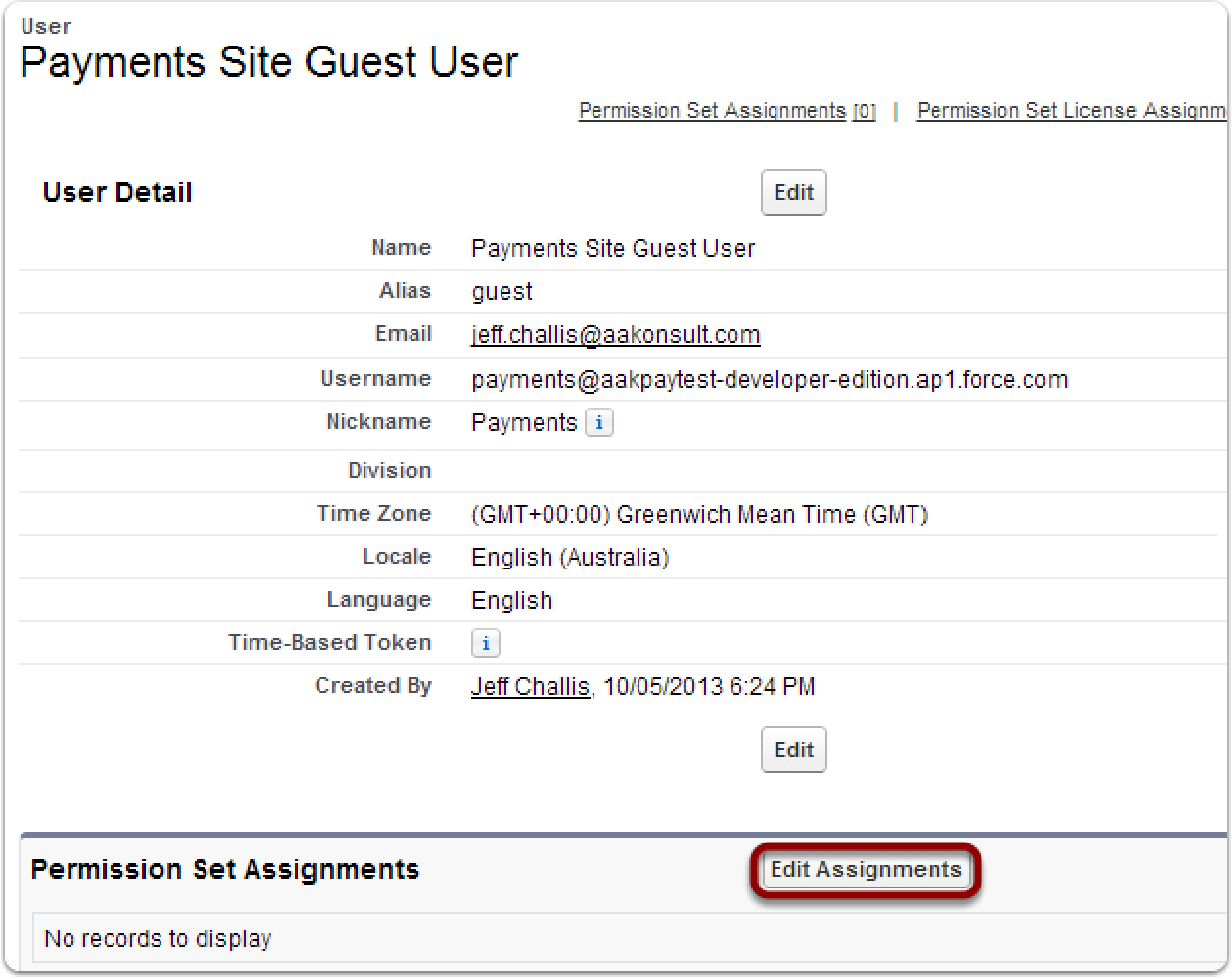


6.3 Check 'Name' and 'Time Zone'

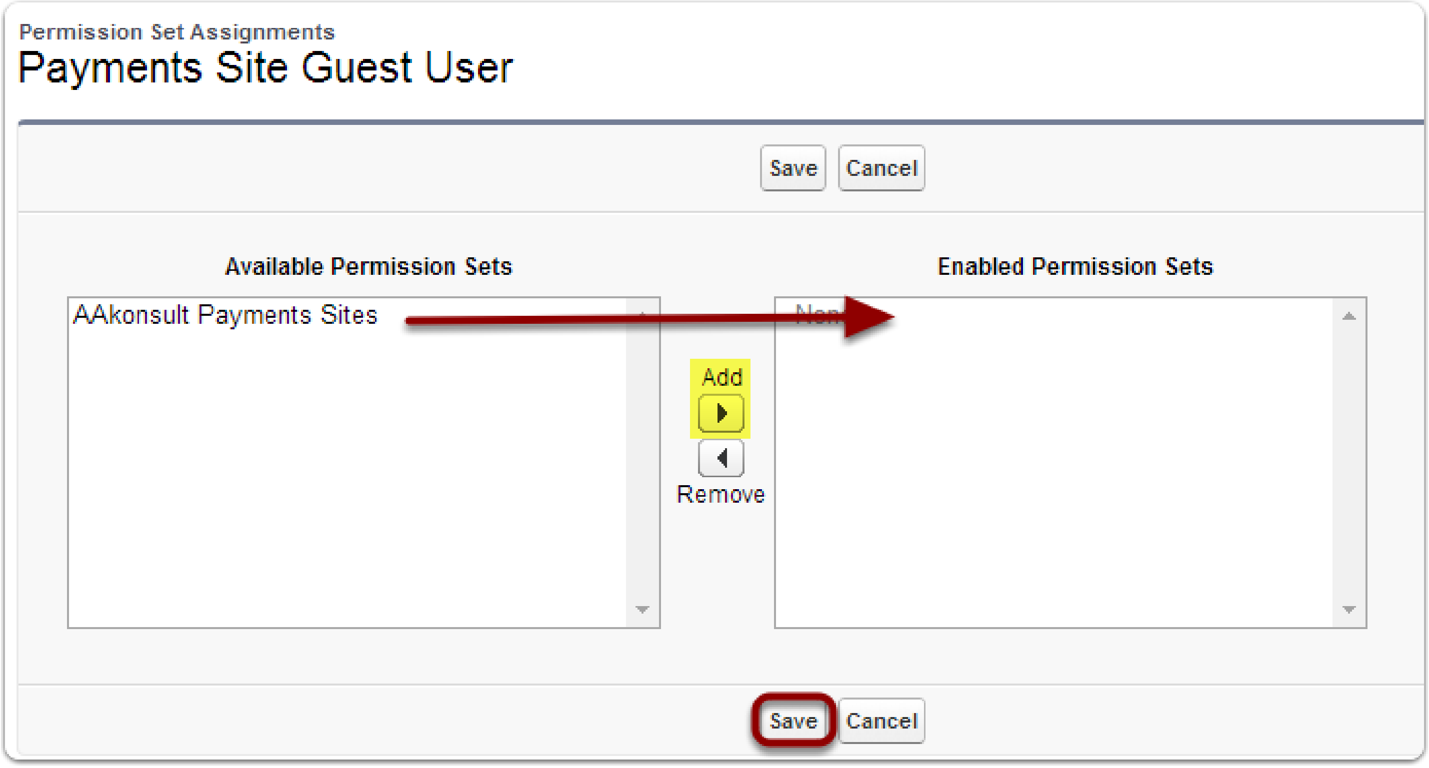
You may wish to edit the name of the Sites Payment User as this is the one the payment receipts will come from by default. Also, check the timezone to make sure it is your local time zone so that payment creation dates reflect the right date.



6.4 Select 'Edit Assignments'



6.5 Add 'AAkonsult Payment Sites' to the Enabled Permission Sets.



6.6 Select 'Save'

7. Review fields visible to website.

7.1 Scroll down to 'Field-Level Security' on the Payments Profile screen

Field-Level Security

Standard Field-Level Security

Account	[View]	Lead	[View]
Asset	[View]	Opportunity	[View]
Campaign	[View]	Opportunity Product	[View]
Campaign Member	[View]	Price Book	[View]
Case	[View]	Product	[View]
Contact	[View]	Solution	[View]
Contract	[View]	Task	[View]
Event	[View]	User	[View]
Idea	[View]		

Custom Field-Level Security

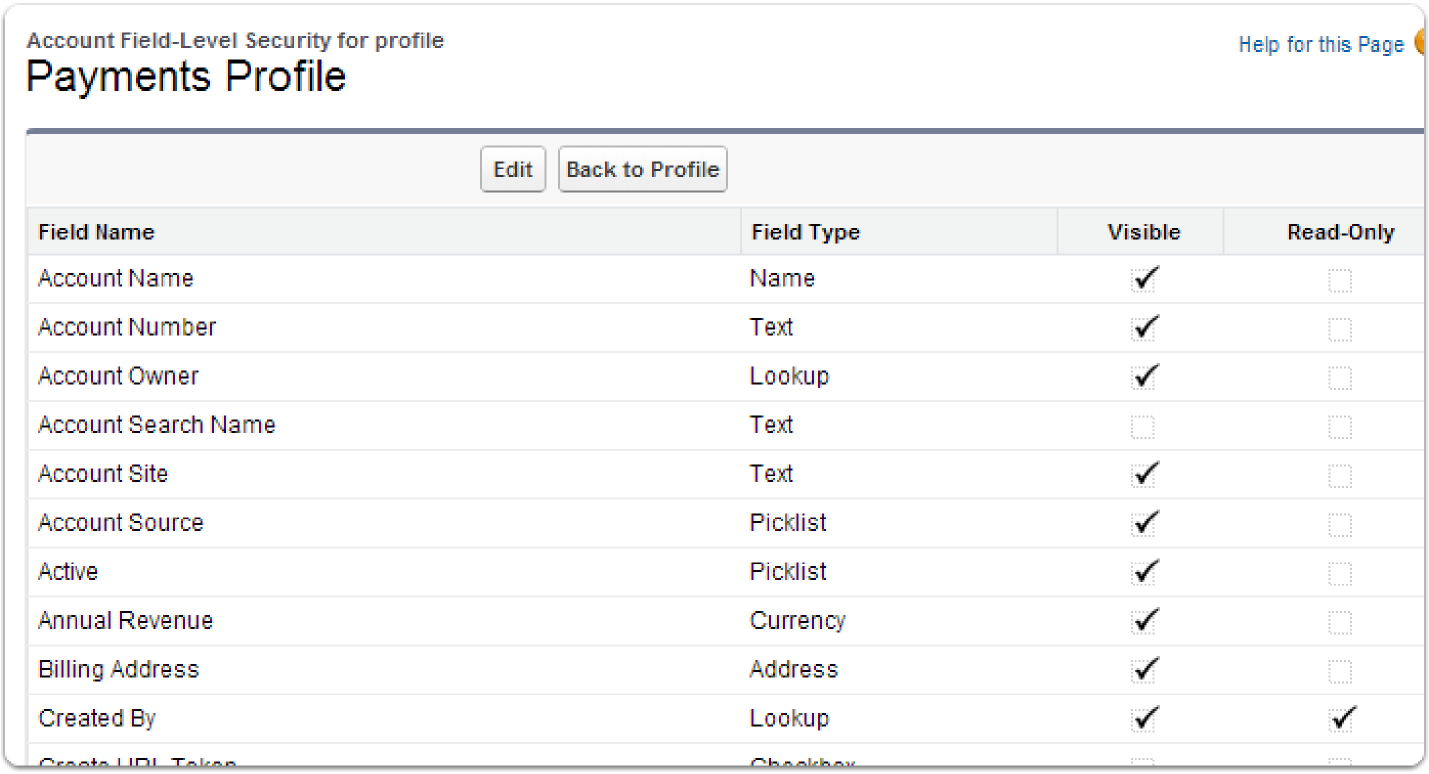
Account Subscription	[View]	Payment Option	[View]
Account Subscription Payment	[View]	Payment Txn	[View]
Direct Debit Batch	[View]	Payment Type	[View]
Error Log	[View]	Recurring Payment	[View]
Import File	[View]	Subscriber Group	[View]
Import File Line Item	[View]	Subscription	[View]
Import File Line Item Payment Txn	[View]	Subscription Issue	[View]
Merchant Facility	[View]	Subscription Issue Item	[View]
Payment Item	[View]	Subscription Payment	[View]
Payment Item Group	[View]	URL Token	[View]

7.2 Click into each area shown.

Check the fields held in Account, Campaign, Campaign Member, Contact and Opportunity.

7.3 Check that the individual fields relevant to you are visible

As a minimum, Name, Address and Amount fields should be ticked at 'Visible'.

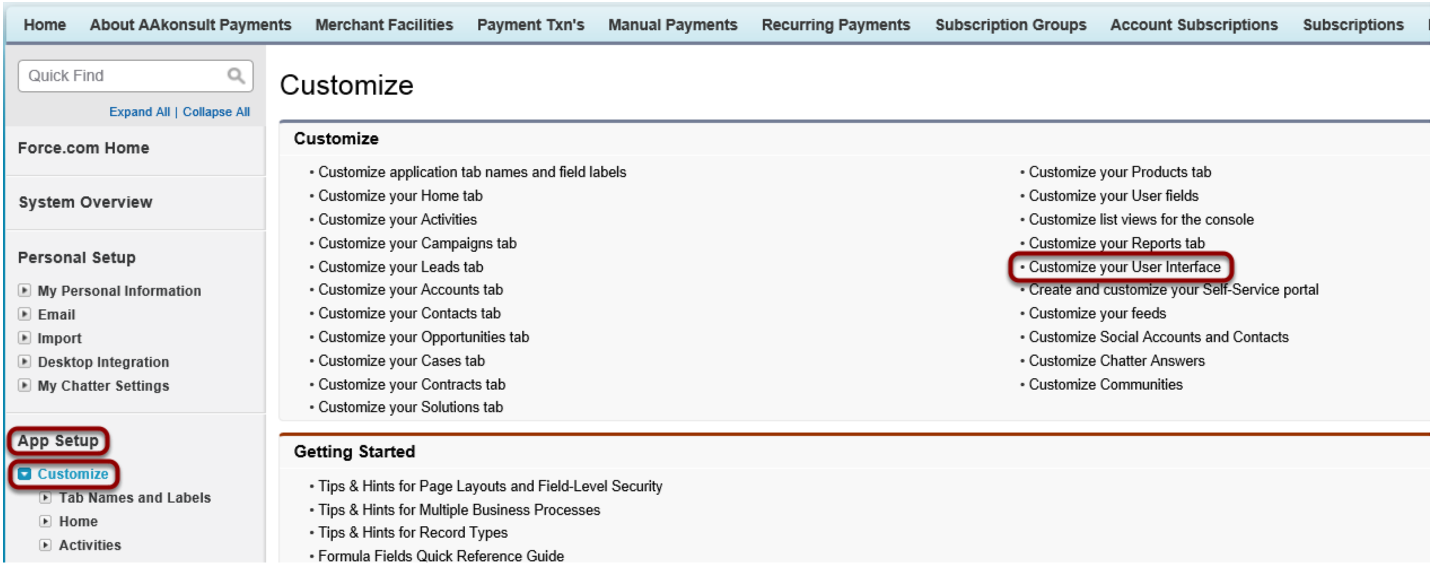


Field Name	Field Type	Visible	Read-Only
Account Name	Name	✓	
Account Number	Text	✓	
Account Owner	Lookup	✓	
Account Search Name	Text		
Account Site	Text	✓	
Account Source	Picklist	✓	
Active	Picklist	✓	
Annual Revenue	Currency	✓	
Billing Address	Address	✓	
Created By	Lookup	✓	✓

8. Revert Salesforce to the enhanced version (if originally unticked for security set up)

Only follow this step if you originally unticked the Enhanced Version of Salesforce for a simpler set up.

8.1 Navigate to Setup > App Setup > Customize and Select 'Customize your User Interface'

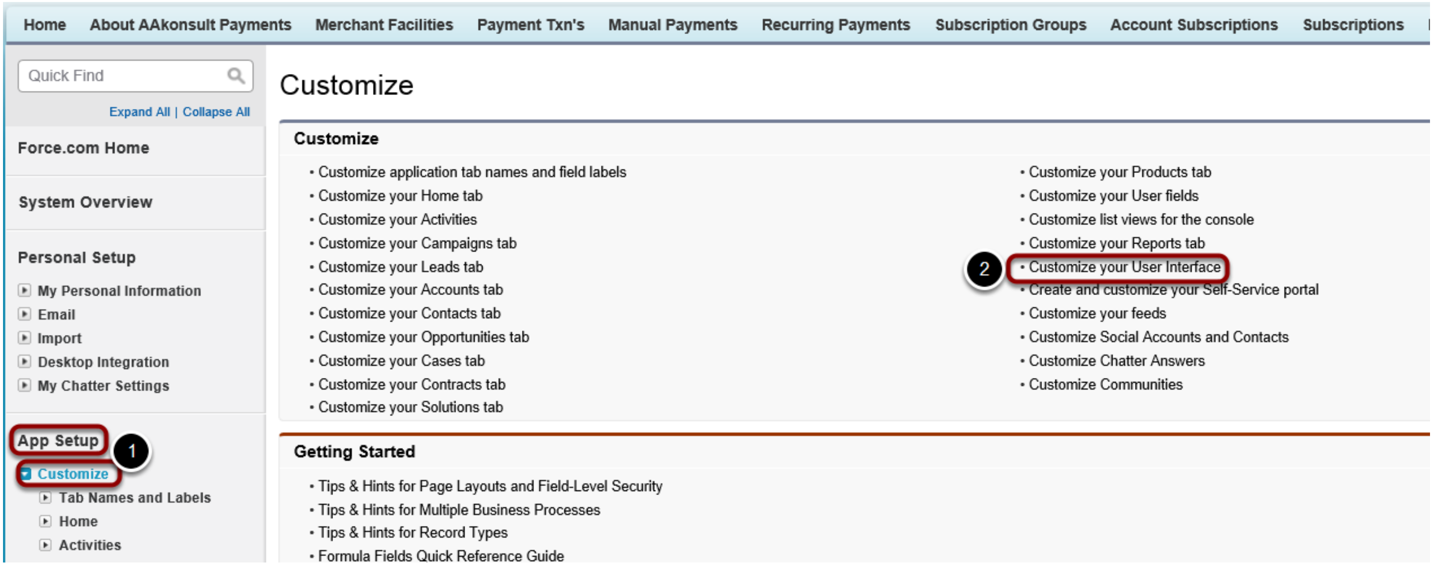


8.2 Tick the boxes shown below and 'Save'

How to set up external site security (enhanced version)

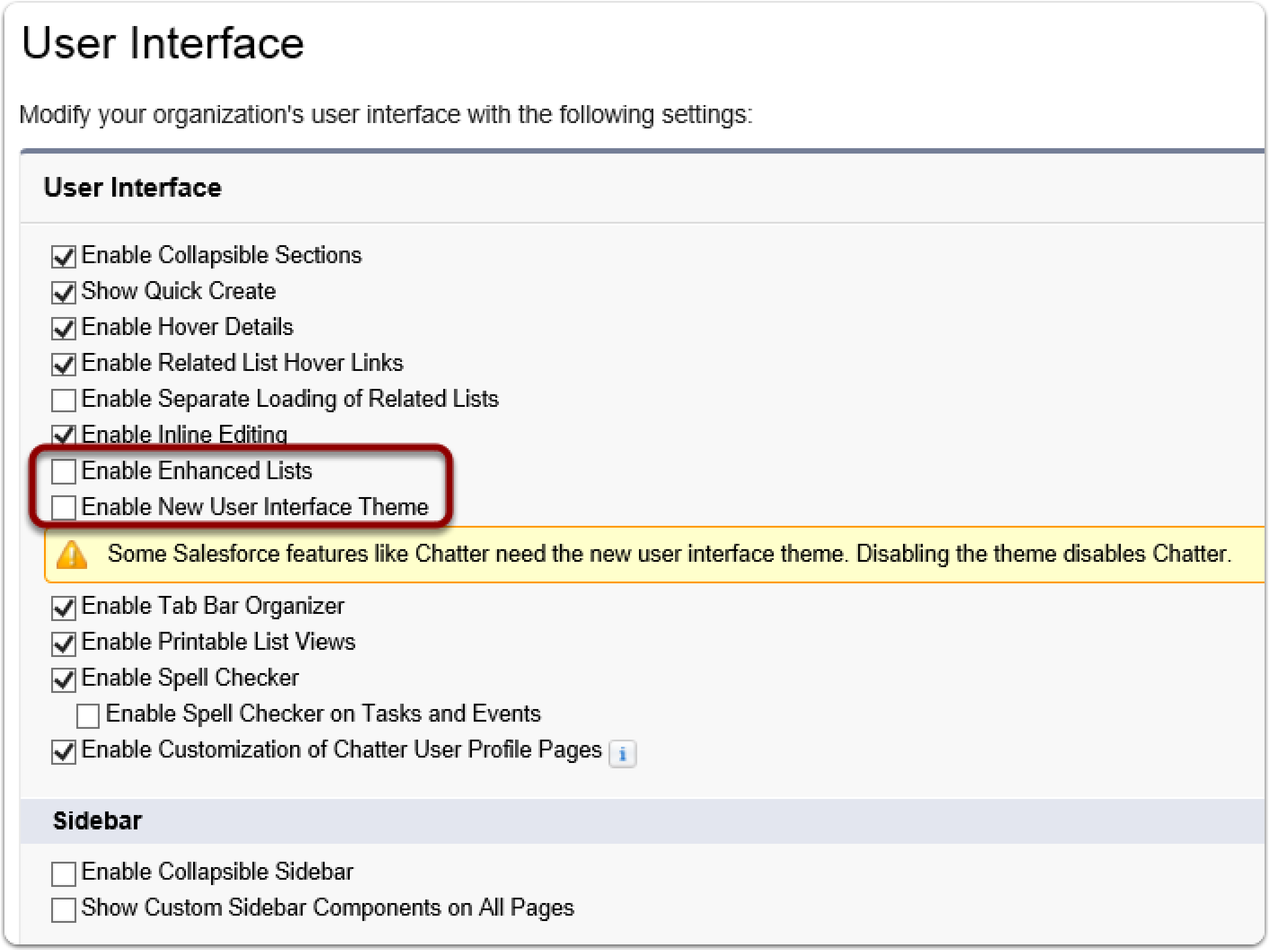
It is simpler to revert Salesforce back to the older version while adjusting Security settings. Be sure to reset back to enhanced version.

1. Navigate to Setup > App Setup > Customize and Select 'Customize your User Interface'



2. Untick the boxes shown below and 'Save'

Remember to return to this screen and tick enhanced version when you have completed setting up your security.



3. Refer to the 'How to set up external site security (older version)' procedure

[How to set up external site security (older version)]

How to set up internal security (Salesforce users)

The below suggestions for security should also be used in conjunction with security best practices. For details on security best practices, visit trust.salesforce.com, then click on the security tab, followed by the best practices link.

1. Read the Salesforce Security Implementation Guide

Security Implementation Guide

2. Select which users should have access to AAkonsult Payments

Only users that need access to *AAkonsult Payments* should be given access

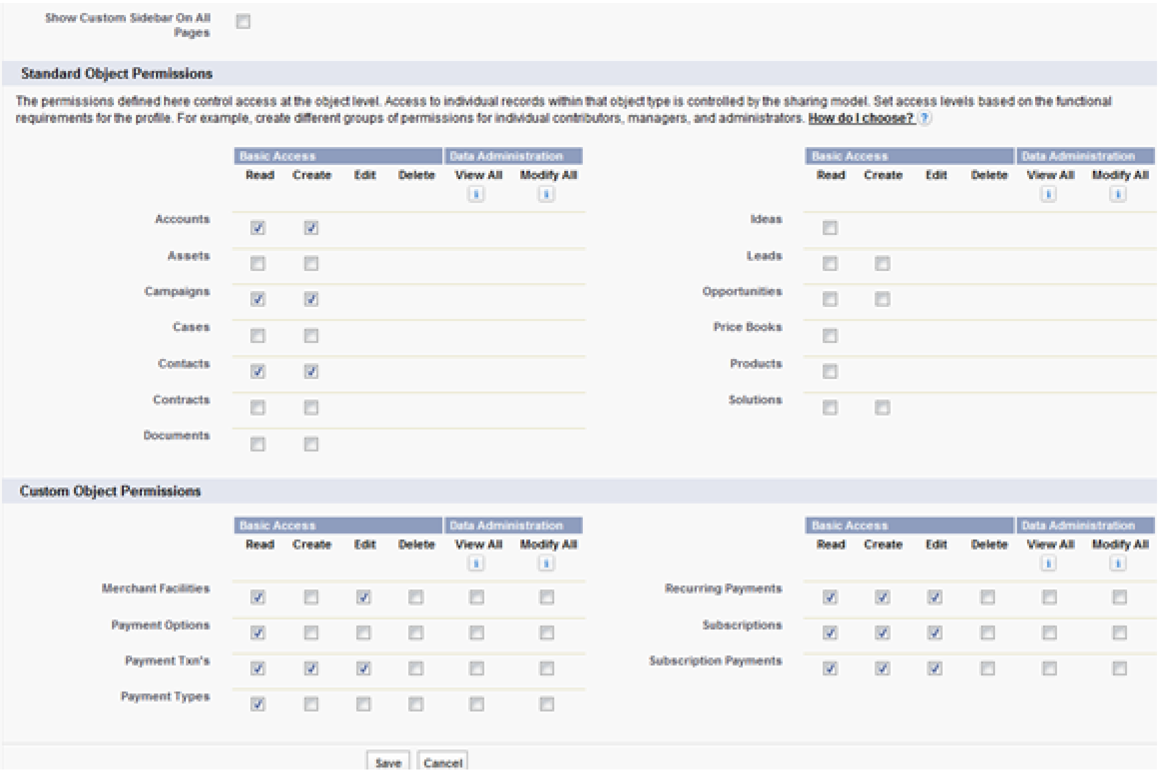
3. Select which users will have access to the Merchant Facilities tab

Only a few select and trusted users should have access to the Merchant Facilities tab

4. Check approvals

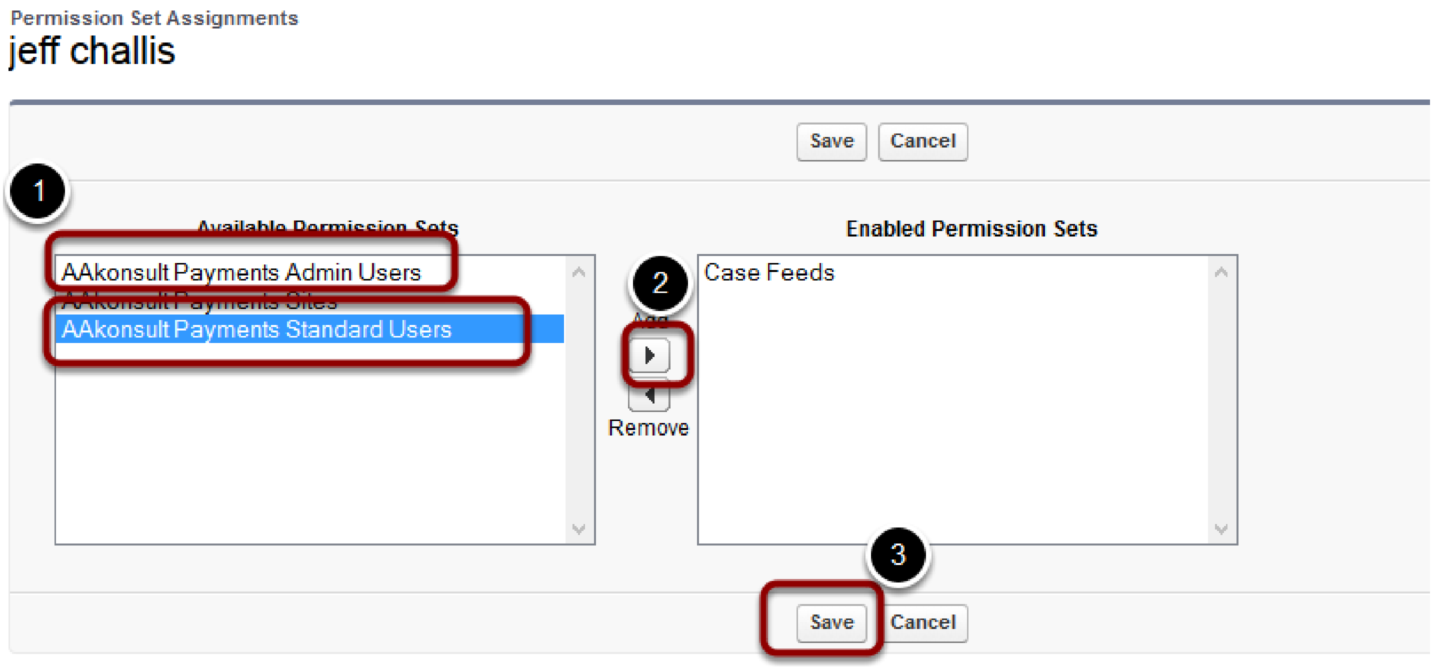
Review which users have access to the Object “Payment Txn”, Field “Approved” button (AAkPay__Payment_Txn__c. AAkPay__Approved__c). For profiles that have users that should not be able to approve refunds then this field should be made read only for them and an Approval Workflow process setup so they can request a refund.

5. Set up profile object security as a maximum per user as shown



- Profiles will need to have Apex Pages with “AAkPay_...” added and also Apex Classes of “AAkPay__...” added.
- Encrypted fields should not be visible for any profile unless absolutely necessary.

6. Assigning permission sets to users



There are two permission sets that are applicable to internal (Salesforce CRM Users). These need to be allocated to the users that will be using AAkonsult Payments.

The Permission Sets to use are:

1. AAkonsult Payments Admin Users - Assign this to users that need to update AAkonsult Payments Payment Forms, Text or are able to approve Refunds.
2. AAkonsult Payments Standard Users - Use this for non approvers and persons that don't need to change any of the AAkonsult Payments Forms or text.

To assign permission sets, locate the user, click into view the details of the user, scroll down to the related "Permissions Set" list. Click the Edit Assignment button and assign.

Payment Gateways

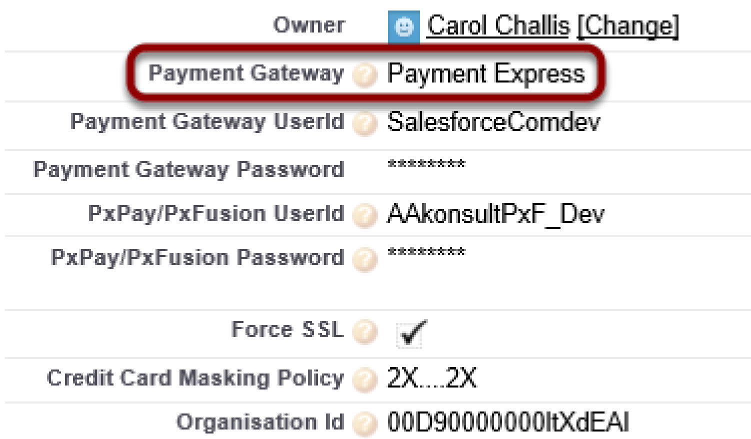
How to set up Payment Express - standard

1. Obtain your Payment Express username from AAkonsult

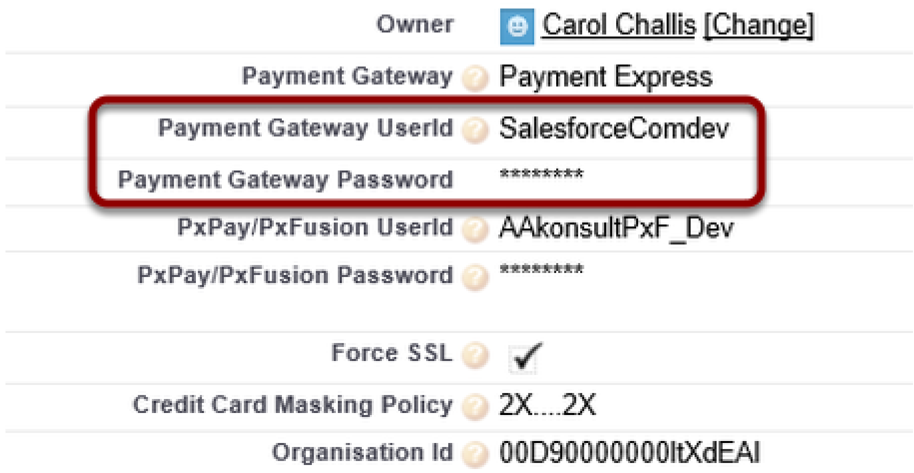
An email will provide instructions on how to obtain your password.

2. Navigate to the Merchant Facilities tab

3. Select 'Payment Express' from the Payment Gateway drop down menu



4. Enter your Payment Express UserID and password



5. Save

How to set up Payment Express - PxPay

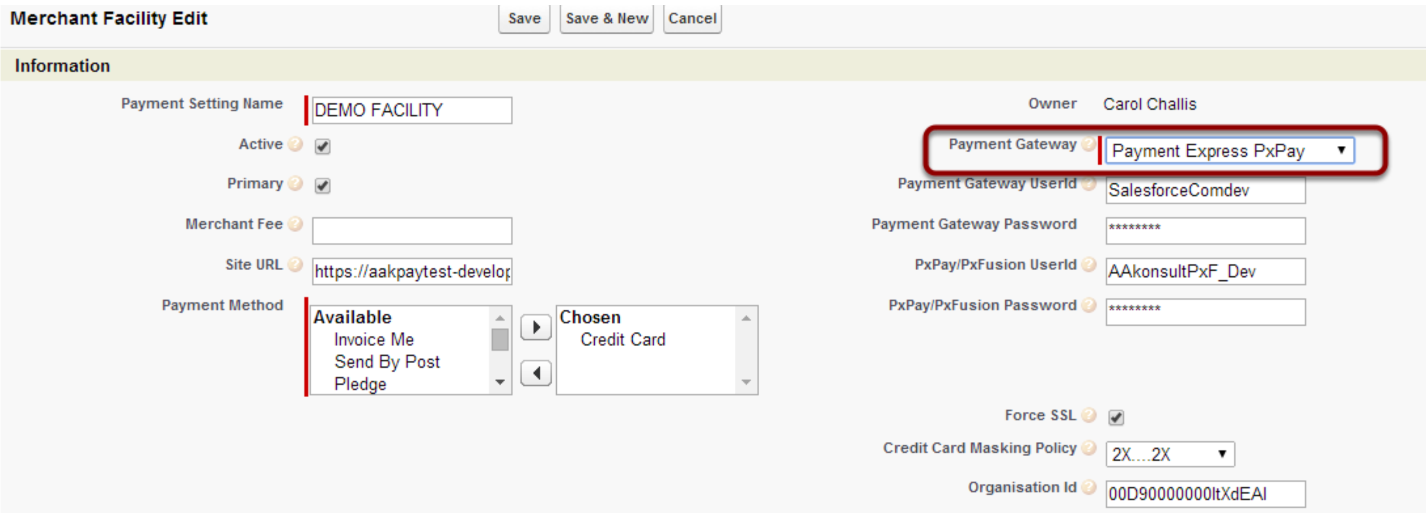
Payment Express provides a DPS hosted payment gateway called PxPay. Some banks may prefer this option over the standard Payment Express offering.

1. Obtain your PxPay username from AAkonsult

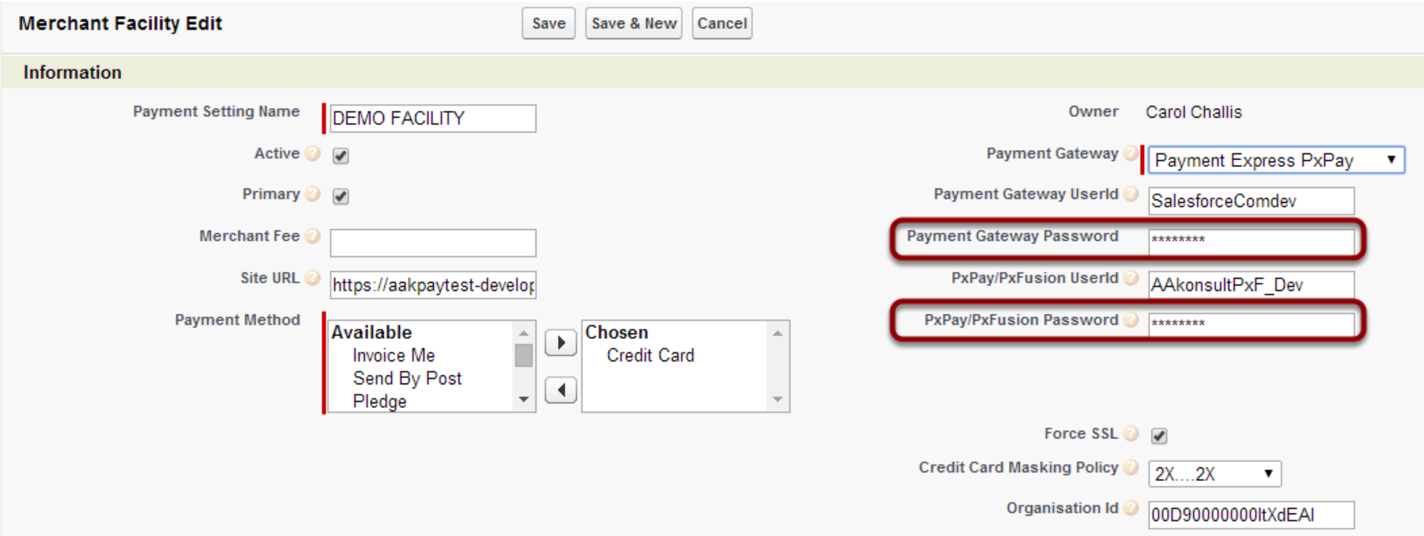
An email will provide instructions on how to obtain your password.

2. Navigate to the Merchant Facilities tab

3. Select 'Payment Express PxPay' from the Payment Gateway drop down menu



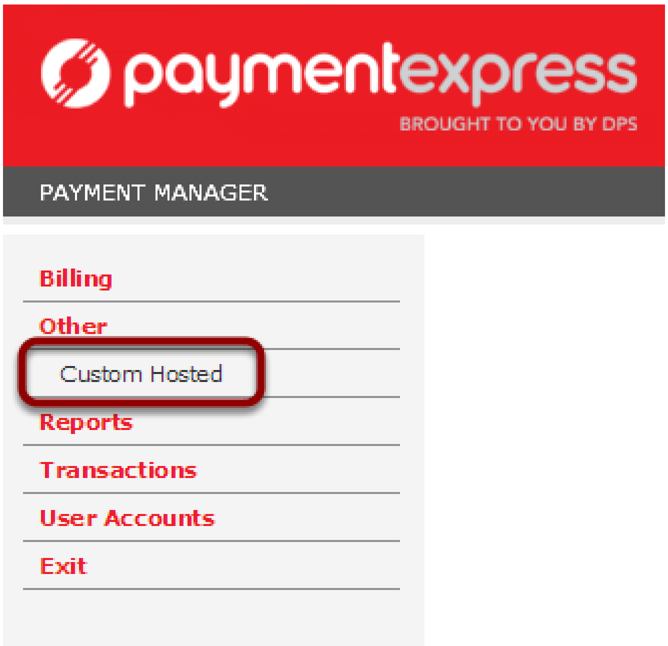
4. Enter both passwords



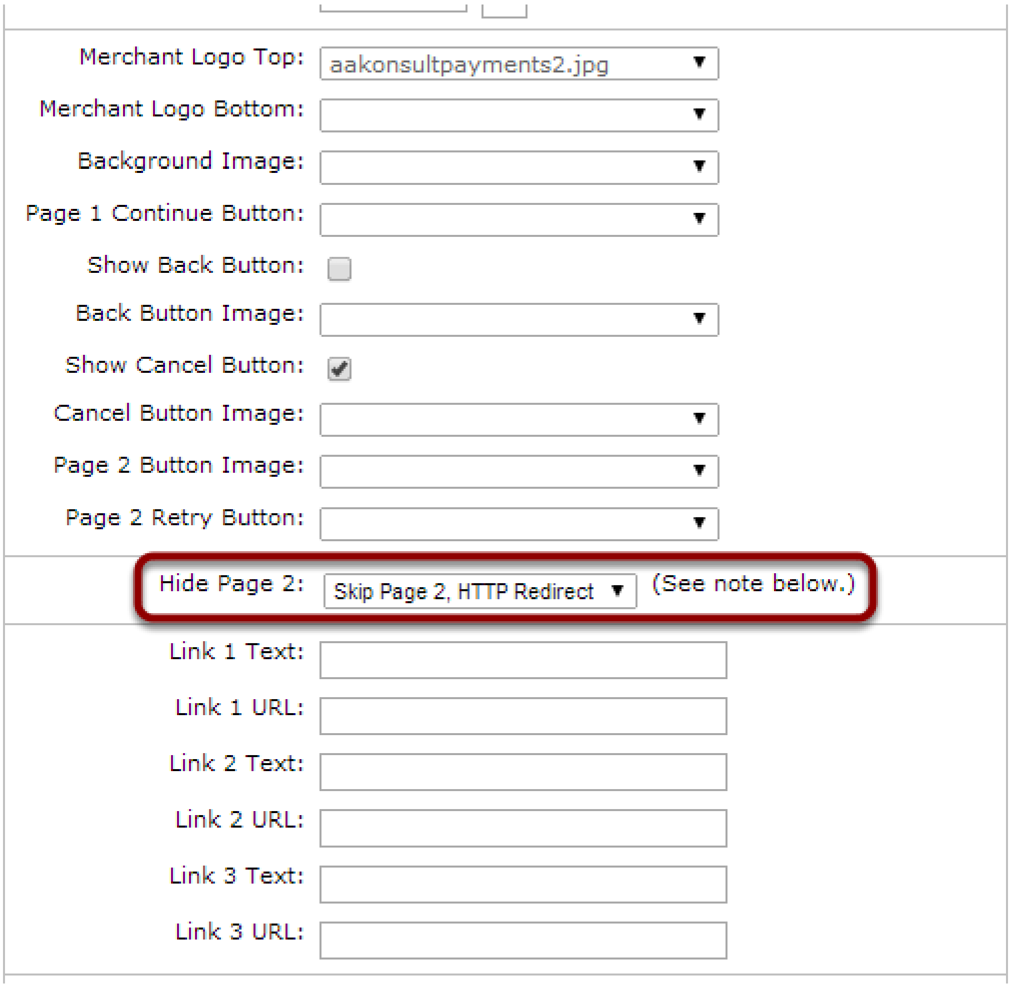
5. Link form screens back to AAkonsult Payment

It is STRONGLY recommended to ensure that nothing stops the processing of a transaction (eg closing a screen before the transaction is complete).

5.1 Login to your Payment Express account and select 'Custom Hosted'



5.2 Scroll down to the 'Hide Page 2' field and select 'Skip Page2, HTTP Redirect'



This will ensure that the payment form will return to AAkonsult Payments when the transaction is complete.

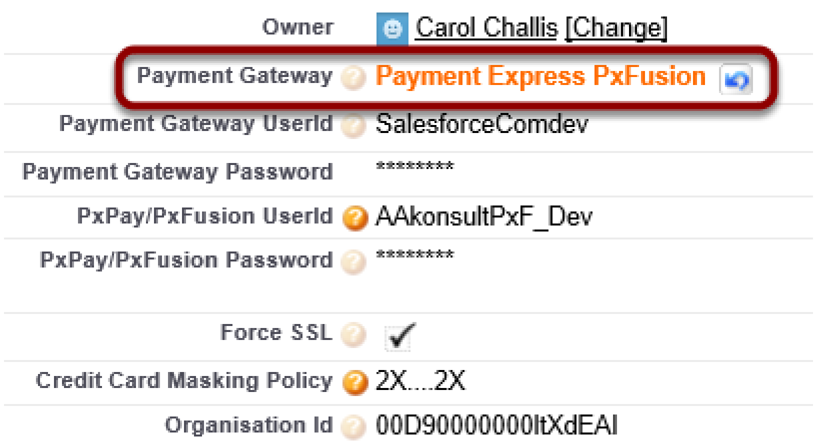
How to set up Payment Express - PxFusion

Obtain your PxFusion username from AAkonsult

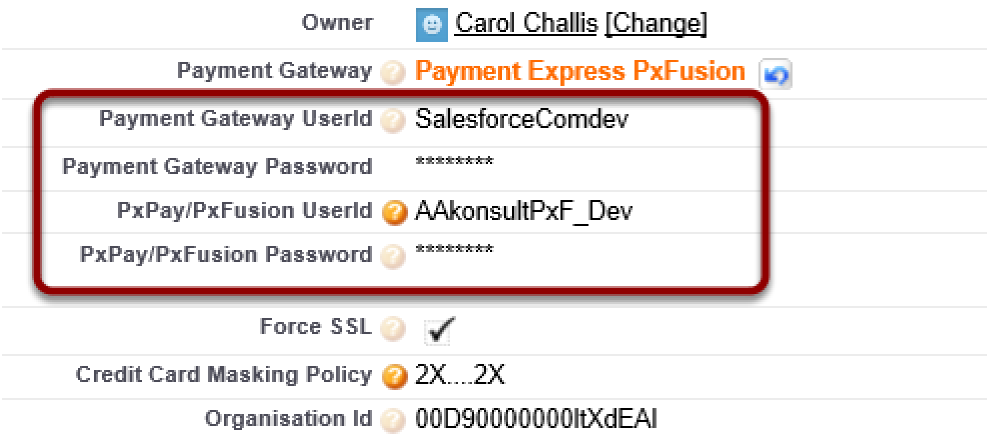
An email will provide instructions on how to obtain your password.

Navigate to the Merchant Facilities tab

Select 'Payment Express PxFusion' from the Payment Gateway drop down menu



Enter both passwords



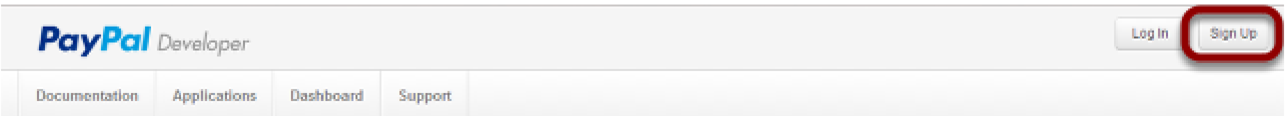
Save

How to set up PayPal

You can configure AAkonsult Payments to work with a PayPal Sandbox (Test) account or Production account. AAkonsult supports PayPal offerings that support the PayPal Express Checkout option.

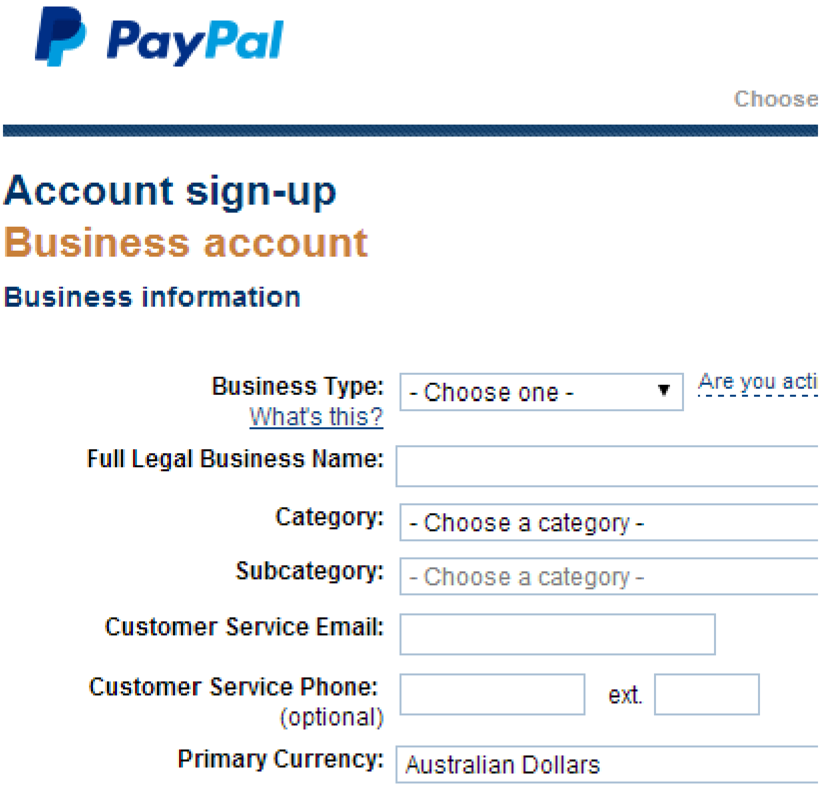
1. Sign up to PayPal

1.1 Go to http://developer.paypal.com



Select 'Sign Up'

1.2 Enter details for your organisation



You will need to select your country for the relevant sign up form.

2. Set up a test (sandbox) version of PayPal

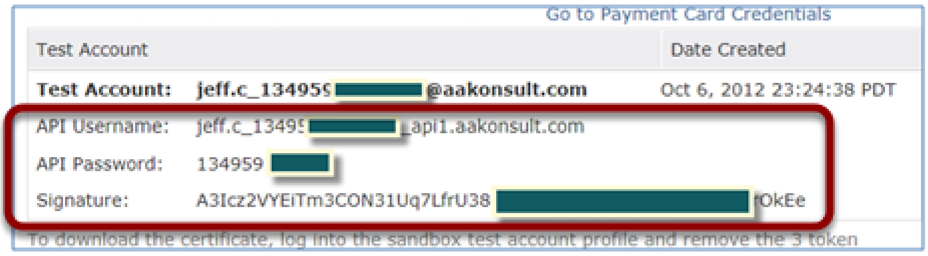
2.1 Login from the confirmation URL

2.2 Select 'Test Accounts' in the left menu

2.3 Set up some of the pre-configured accounts

Select 'Buyer', 'Seller' and 'Website Seller Pro' and set some amounts in each.

2.4 Select the 'API' and 'Payment Card Credentials' on the top left side of screen

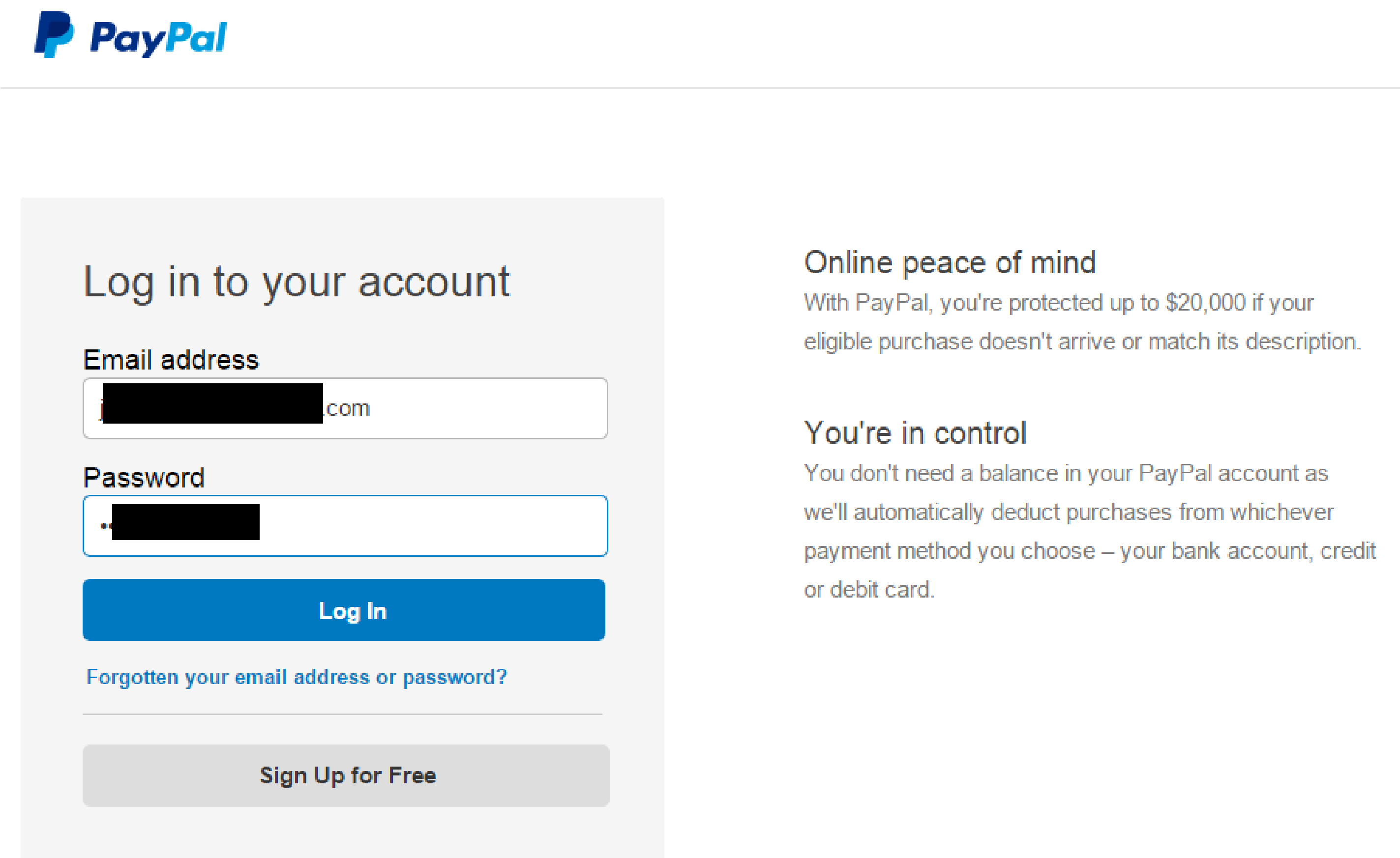


2.5 Copy the API Username, API Password and API Signature to the fields with the same name on the Merchant Facility tab

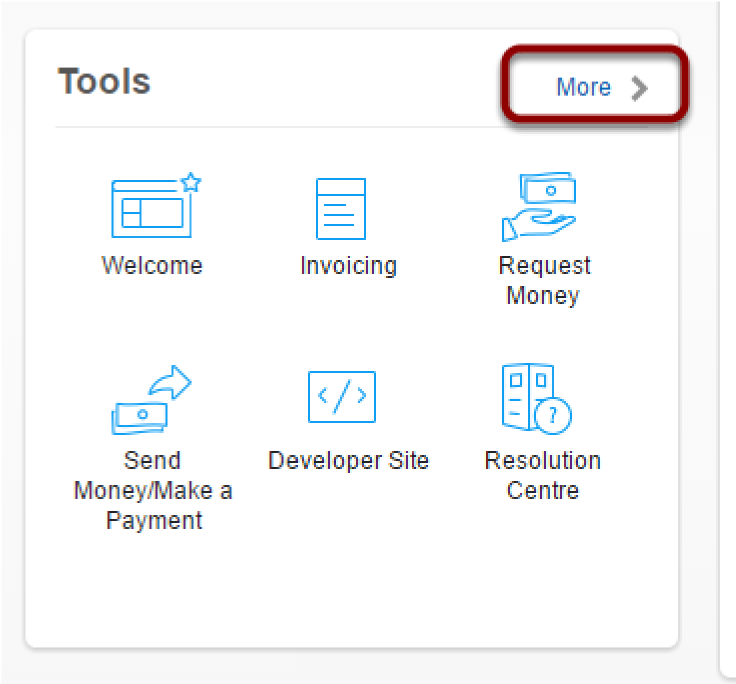
Ensure you select the correct PayPal Environment

3. Set up a live (production) version of PayPal

3.1 Login to your production version of PayPal

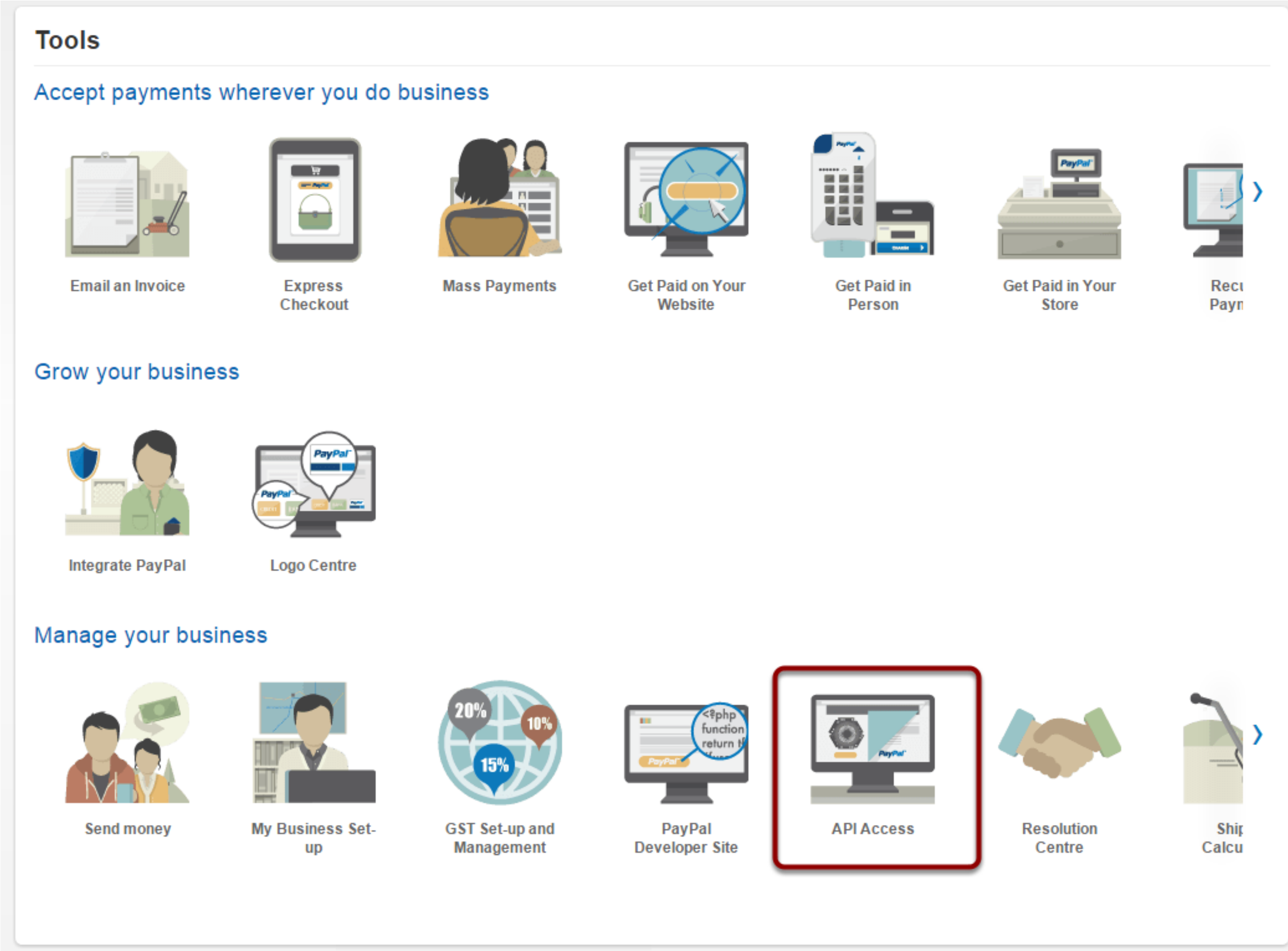


3.2 Select More from the tools section



On your home screen, there should be a Tools Pallet Visible. Select the More option.

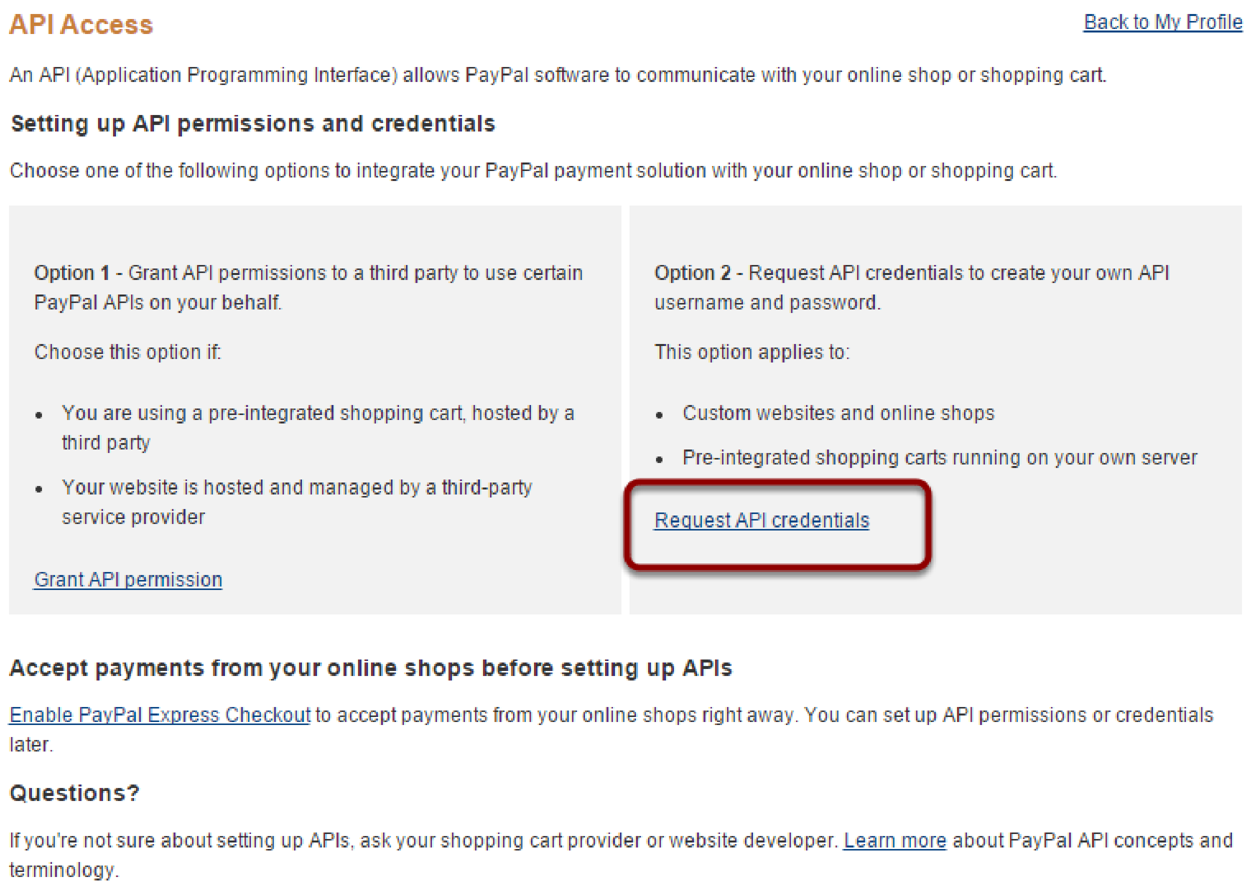
3.3 API Access



Select API Access from the "Manage your business" section.

Press the GO TO API access area when prompted.

3.4 Select the 'Option 2 - Request API credentials to create your own API username and password'



API Access

Back to My Profile

An API (Application Programming Interface) allows PayPal software to communicate with your online shop or shopping cart.

Setting up API permissions and credentials

Choose one of the following options to integrate your PayPal payment solution with your online shop or shopping cart.

Option 1 - Grant API permissions to a third party to use certain PayPal APIs on your behalf.

Choose this option if:

- You are using a pre-integrated shopping cart, hosted by a third party
- Your website is hosted and managed by a third-party service provider

Grant API permission

Option 2 - Request API credentials to create your own API username and password.

This option applies to:

- Custom websites and online shops
- Pre-integrated shopping carts running on your own server

Request API credentials

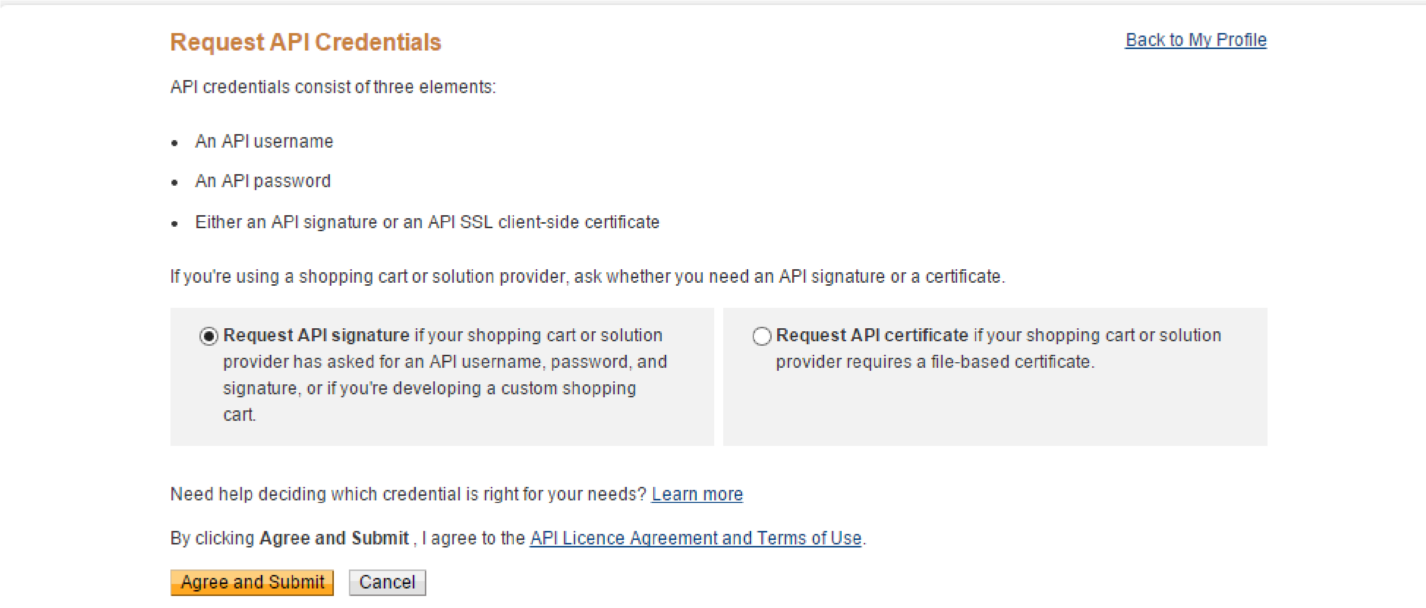
Accept payments from your online shops before setting up APIs

Enable PayPal Express Checkout to accept payments from your online shops right away. You can set up API permissions or credentials later.

Questions?

If you're not sure about setting up APIs, ask your shopping cart provider or website developer. Learn more about PayPal API concepts and terminology.

3.5 Select the 'Request API Signature' option and 'Agree and Submit' button

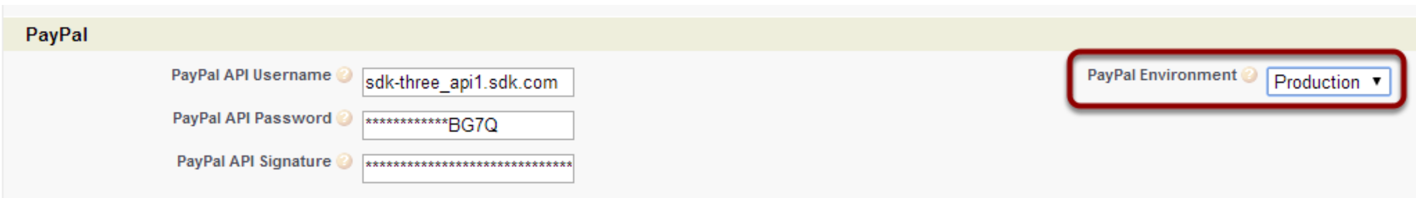


You will be shown a screen that has;

- API Username
- API Password
- Signature

3.6 Copy these values to PayPal fields on the Merchant Facility tab

3.7 Set the PayPal Environment to 'Production'

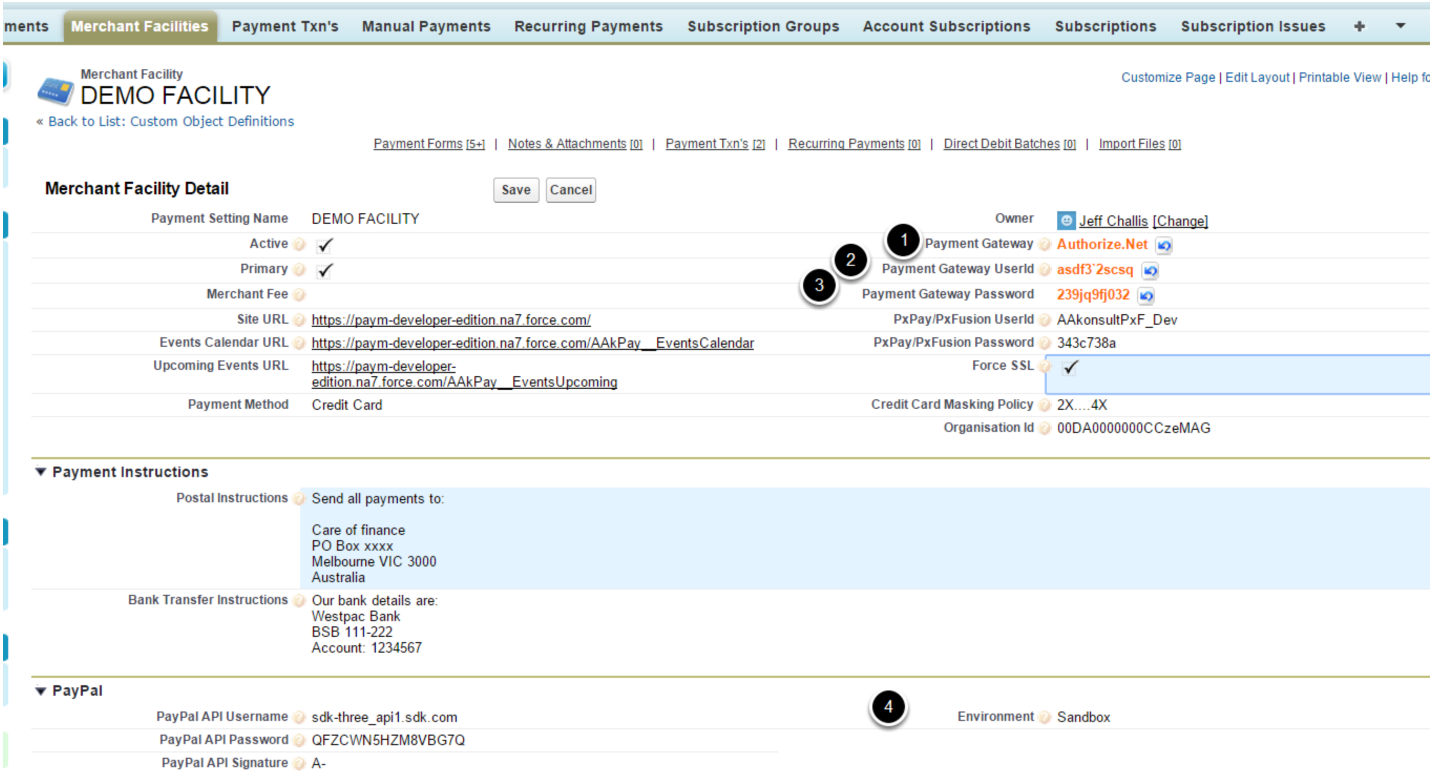


How to setup Authorize.Net

1. Obtain your Authorize.net Payment Gateway Details

Please refer to the [How to obtain an eCommerce Merchant Facility for Authorize.Net]() if you do not already have your Authorize.net credentials.

2. Setup AAkonsult Payments for Authorize.Net



Once you your login details (API Login Id and Transaction Key), then you need to enter these into the Merchant Facility.

Navigate to the Merchant Facility Tab, press [GO] to see all facilities and click into the one you wish to use or press NEW button to create a new one.

On the Merchant Facility, make sure the following details are entered/updated

1. Payment Gateway is set to "Authorize.Net"
2. Payment Gateway userId is set to the API Login Id provided
3. Payment Gateway Password is set to the Transaction Id provided
4. Environment is set to Sandbox or Production

Address autocomplete and validation

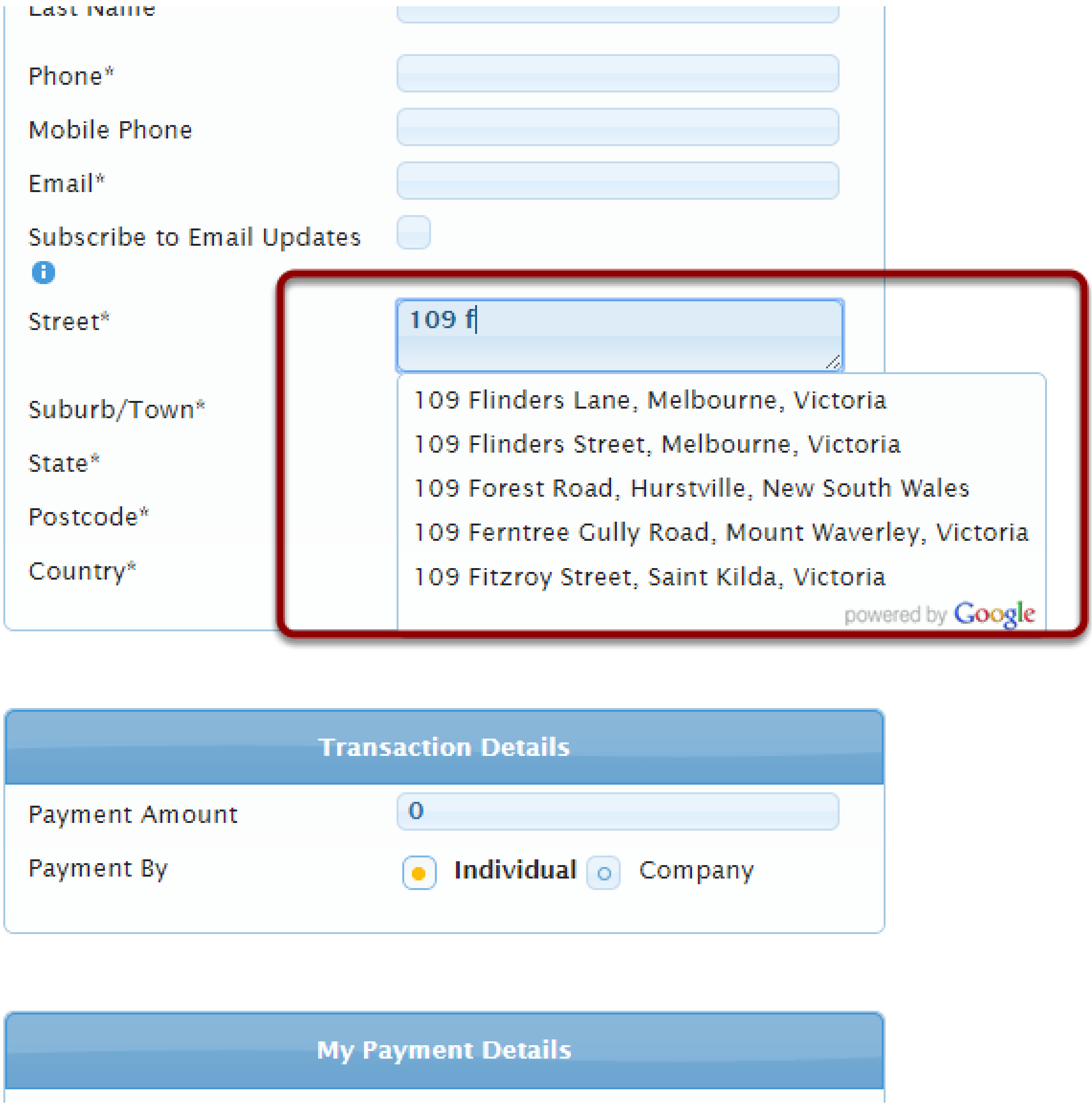
Which address tool?

AAkonsult currently Supports the following address autocomplete tools:

1. Google Places
2. DataTools Kleber

The following provides some notes on which option to consider for each of the above.

1. Google Places



Google Places is powered by the same information used by Google in Google Maps and Google+ Local

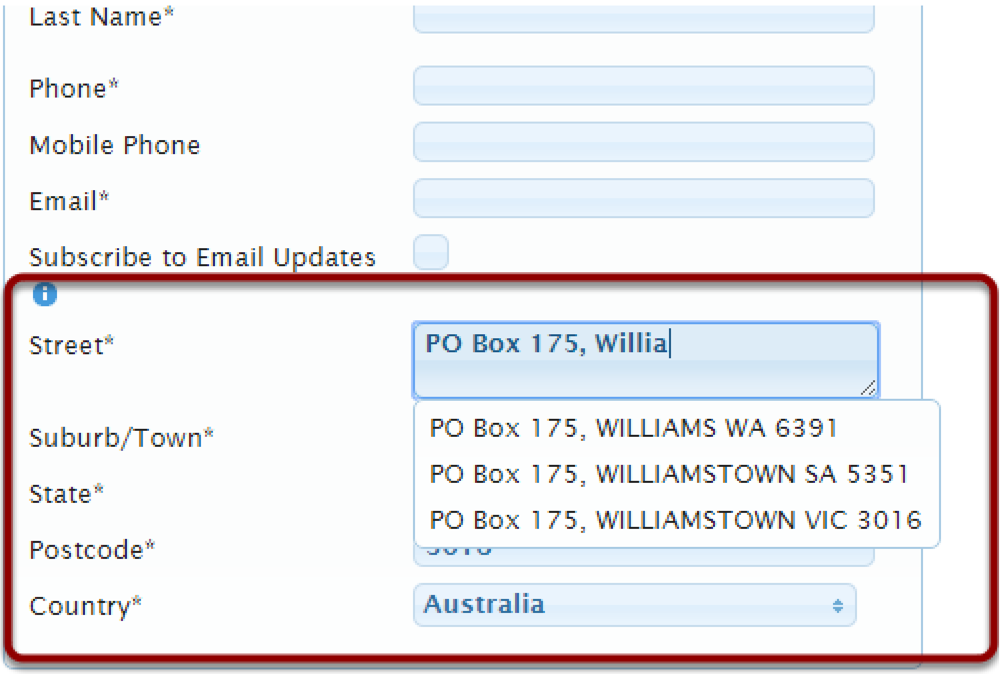
Google may charge for this service at some stage, but at the time of writing, this offering is currently free. All you need to do is sign up for a Google Places API Key.

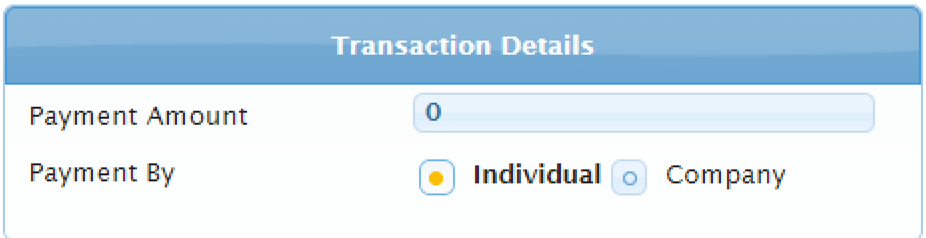
The Google Places option is fast.

The Google Places option is not as good as Kleber for its completeness of addresses. For example levels of buildings and unit numbers. In addition, this option does not return post identifiers such as Delivery Point ID (DPID) in Australia or the equivalent in other countries.

To setup and use Goolge Places, please see [How to setup Google Places Address Validation]

2. DataTools Kleber





Kleber by Datatools provides a very complete world wide address database.

AAkonsult Payments will not charge any fee for the Kleber integration, providing organisations sign up to Kleber through the AAkonsult Kleber Link. You will need a AAkonsult Kleber license key that is provided after signing up for Kleber.

Kleber is a paid product and in our opinion the prices are very competitive.

Kleber has a more complete address listing than Google Places and includes details such as Unit No, building level etc.

It is AAkonsult's current intention to expand the functionality of AAkonsult Payments to take more advantage of other API's and data validation provided by DataTools over time.

To setup and use DataTools Kleber, please see How to setup DataTools Kleber

How to setup Google Places Address Validation

Quick Steps:

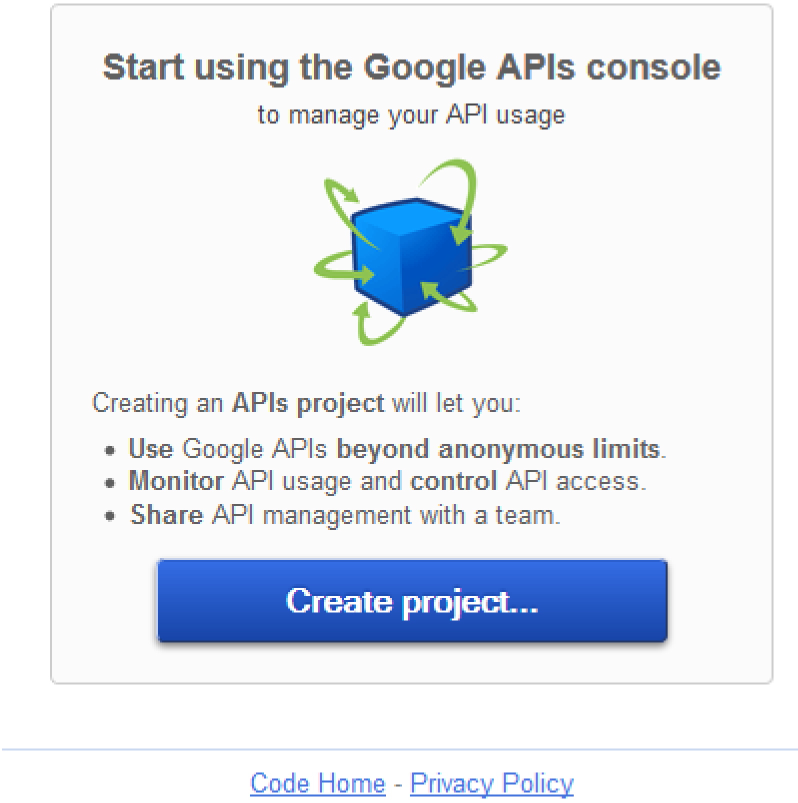
1. Sign up for a Google Places API Key
2. Enter key into Merchant Facility and select Google Places as the Address Helper

1. Login to the Google API Console

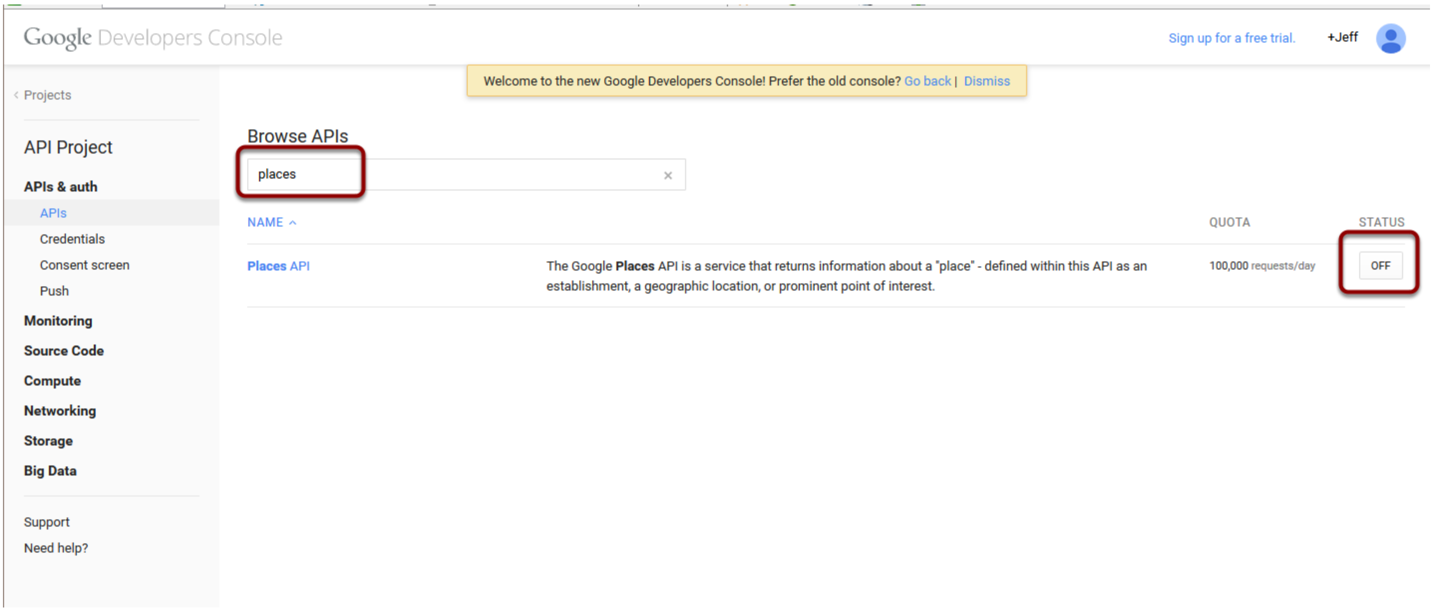
Navigate to the Google API Console. This is located at: https://code.google.com/apis/console

You will be asked to login. If you do not already have an account then sign up for a free account.

2. Create or using an existing project



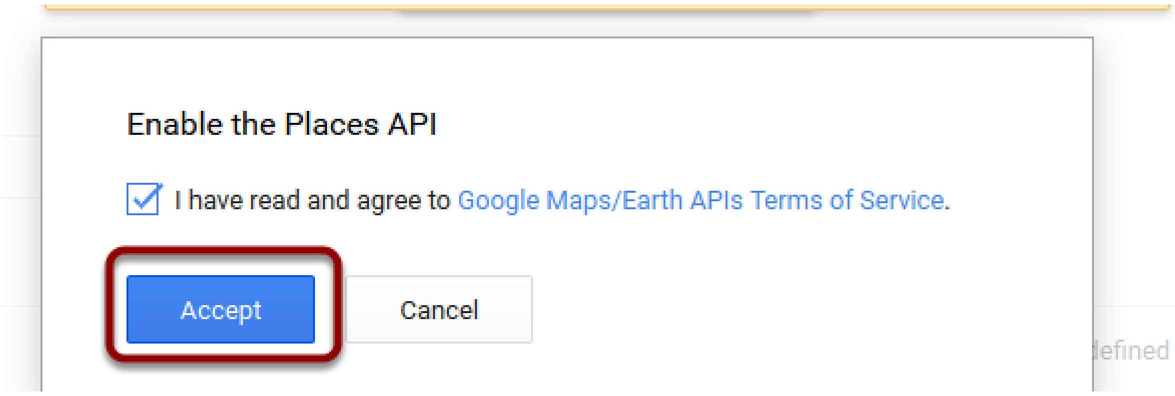
3. Locate Places API and Start



Type "Places" in the browse APIs selection.

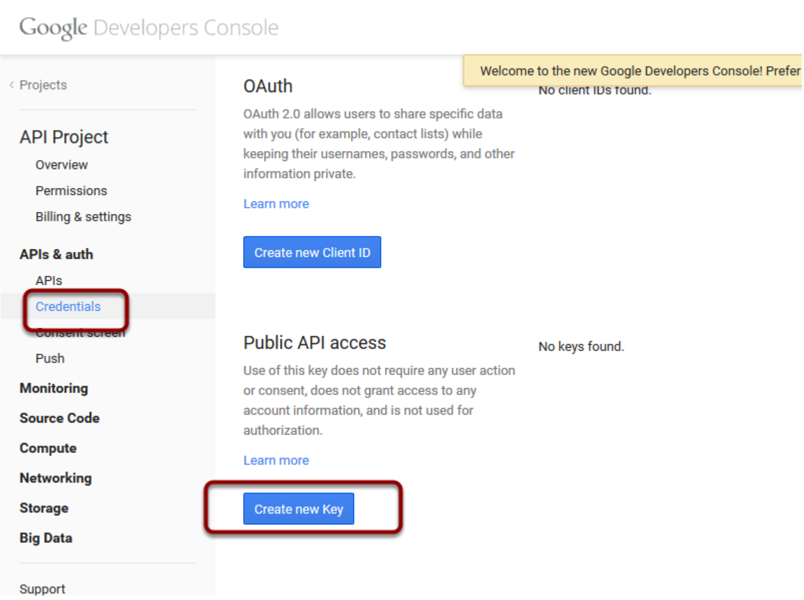
Once you have located the "Places API", press the "OFF" button to activate the API

4. Agree to Terms and Conditions



Read, understand and agree to the Terms and Conditions

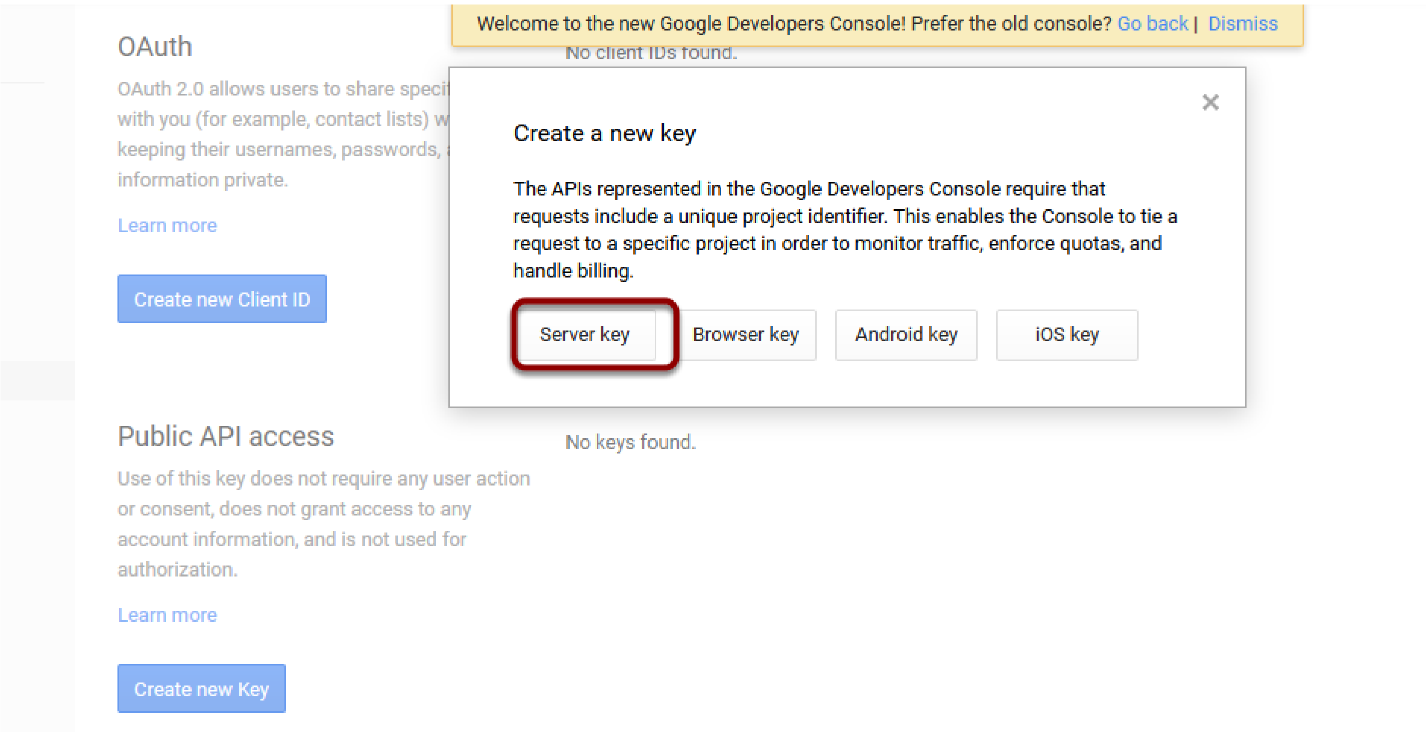
5. Create Credentials



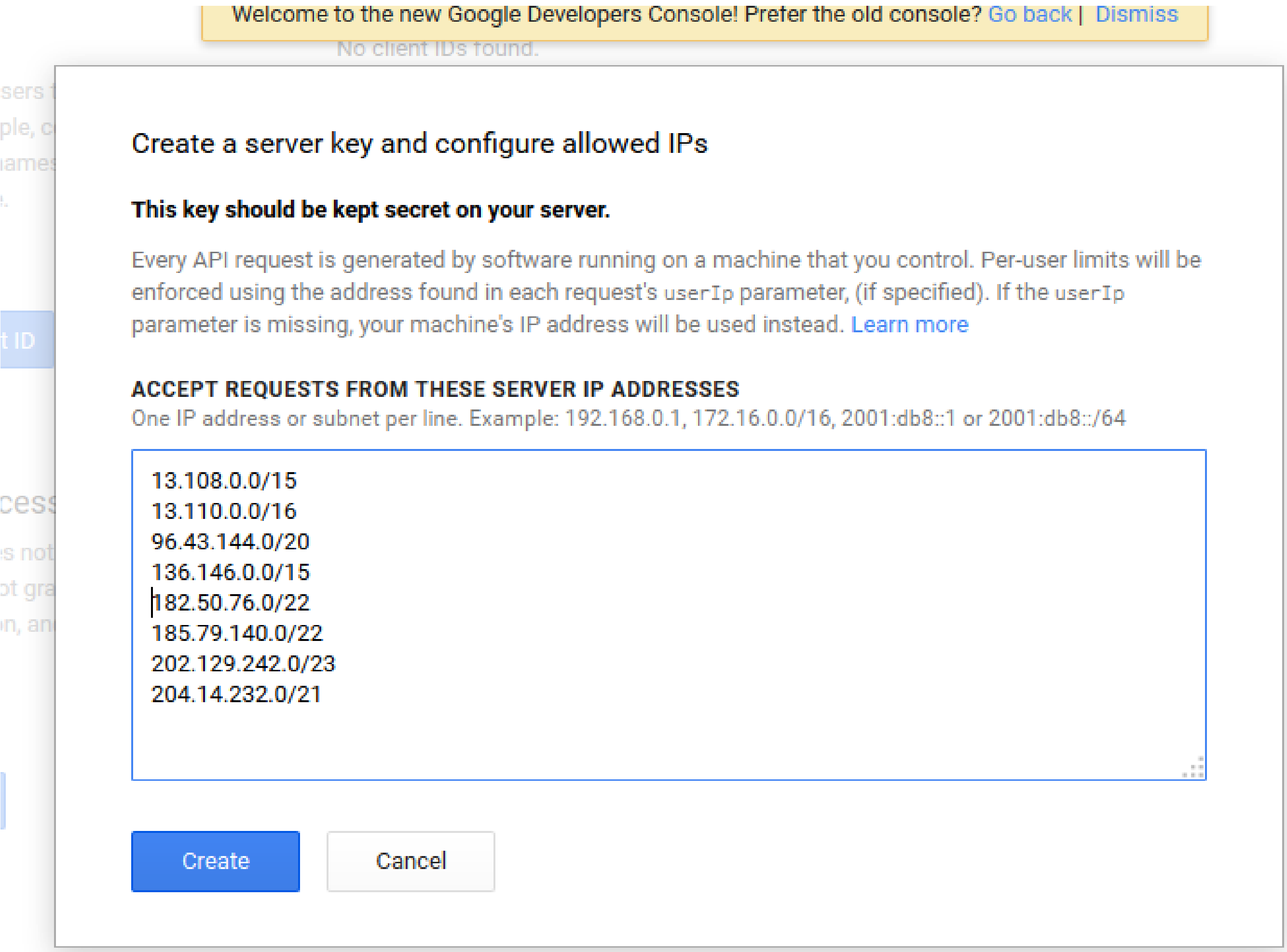
Click on the "Credentials" link under the APIs & Auth menu option.

Then click on the "Create New Key" button

6. Create a new Server Key



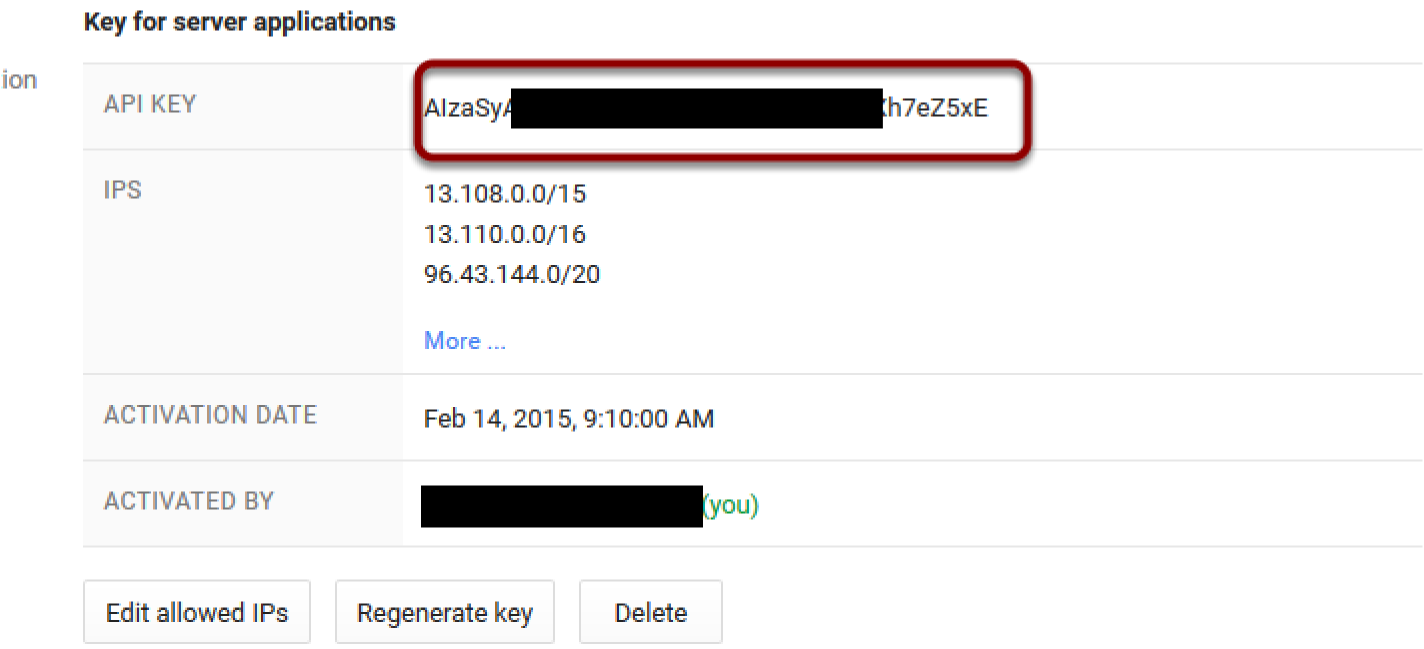
7. Assign Salesforce Server IP addresss



See the current Salesforce IP server IP Addresses in the following IP addresses to whitelist article (Please make sure you use the addresses in this article under the required for access section as these addresses can vary from the ones shown above screenshot as Salesforce updates IP ranges)

Copy test values in and press Create button

8. Copy your API Key



Copy this API key as it needs to be entered into the Merchant Facility in Salesforce

9. Update Salesforce with your Google API Key

Navigate to the "Merchant Facility" Tab in Salesforce. Press GO button and and for Merchant Facility that you wish to have google Places/Auto complete enabled update the following:

1. Set the Address Helper to Google Places
2. Update the Address Password/Token to be your Google Places API code.

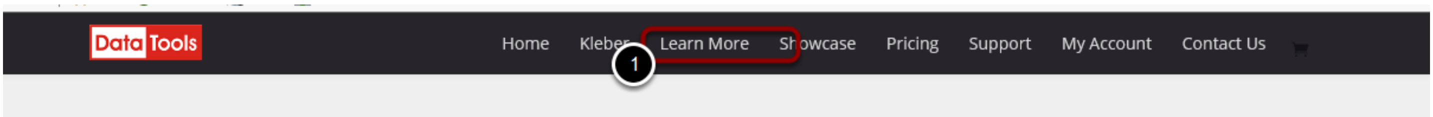
Press Save

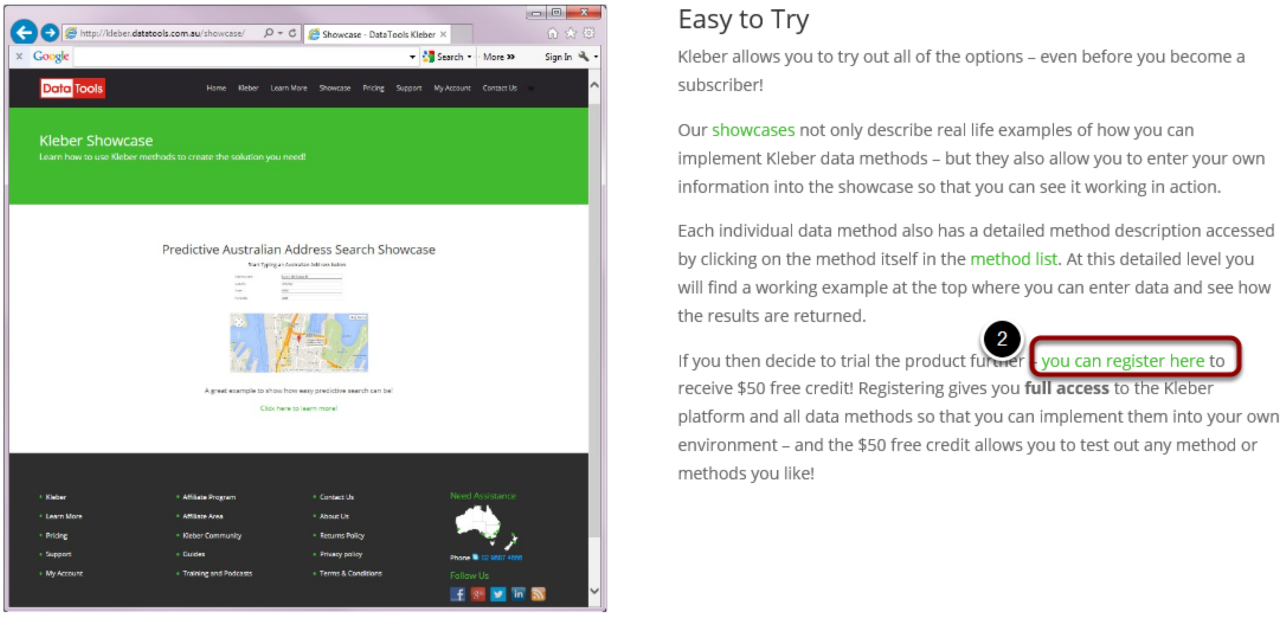
How to setup DataTools Kleber

Quick Steps:

1. Sign up for a Kleber API Key through [AAkonsult Kleber]
2. Enter key into Merchant Facility and select Google Places as the Address Helper

1. Sign up for Kleber



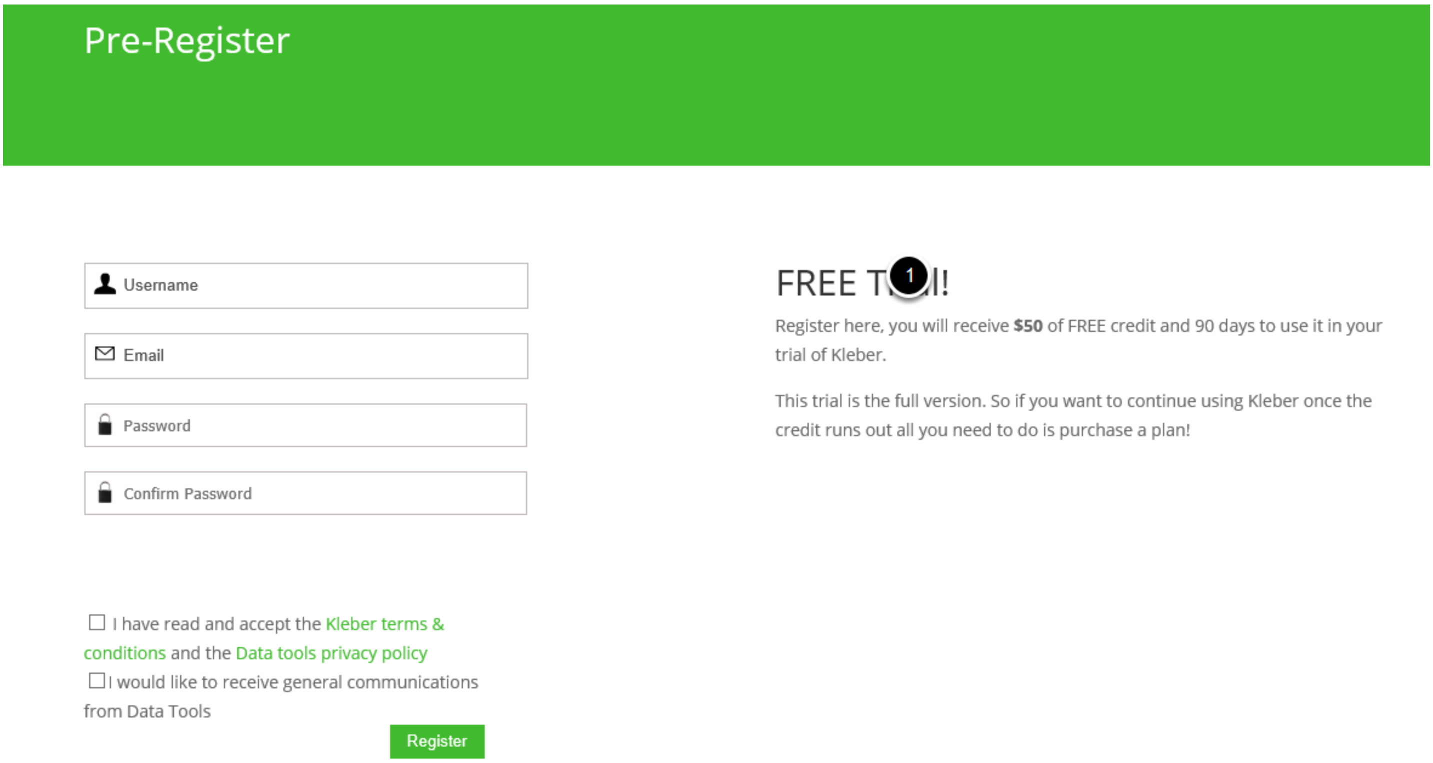


Kleber currently includes a credit for organisations to trial their tool

AAkonsult will not be charging anything additional for the Kleber Integration, providing organisations sing up through the AAkonsult Kleber link. If you are already a DataTools Kleber customer, then please contact info@aakonsult.com for the Kleber pricing information.

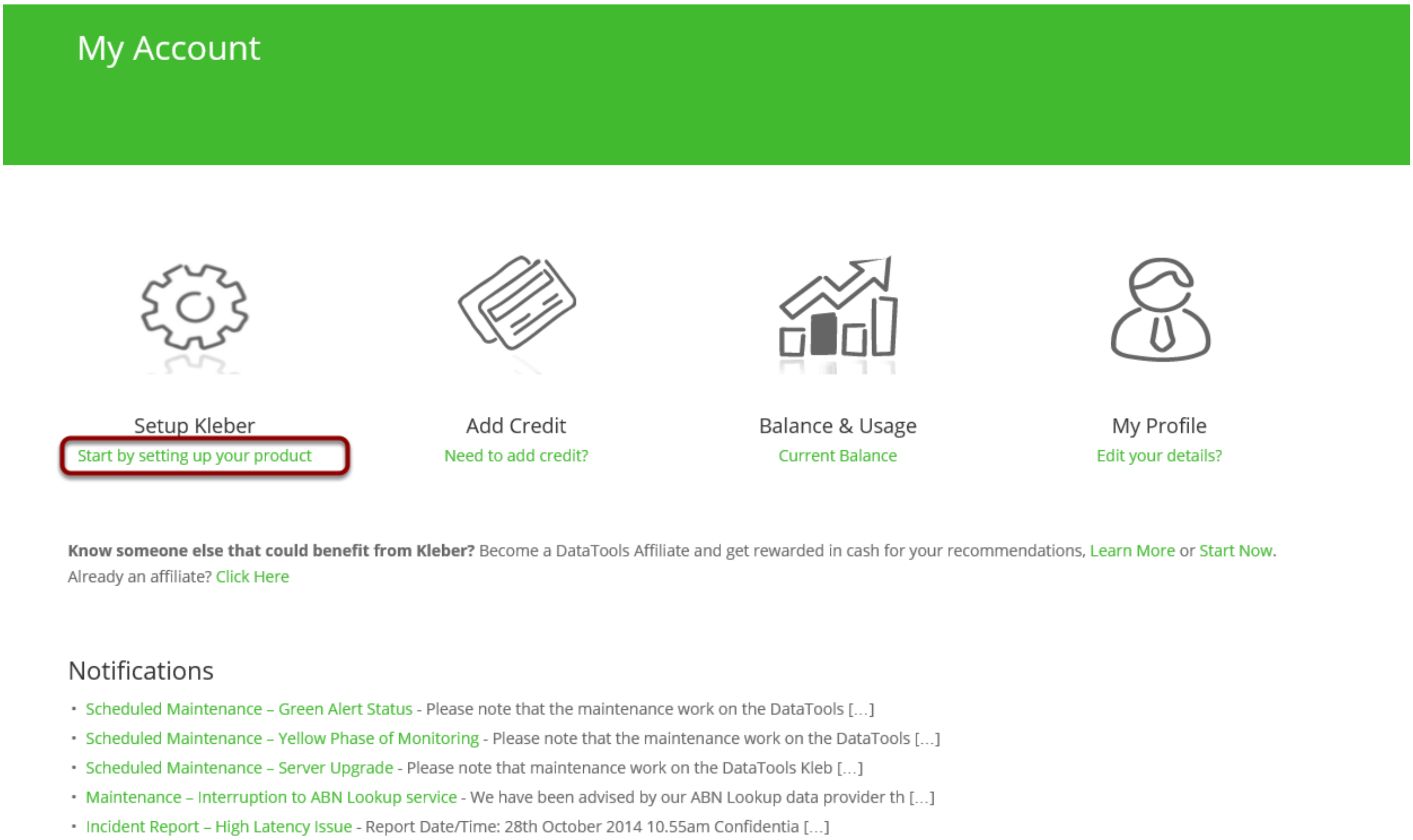
After clicking on AAkonsult Kleber link, then select the Learn More Tab, followed by "you can register here" link in the Easy to Try section.

2. Register for the free trial



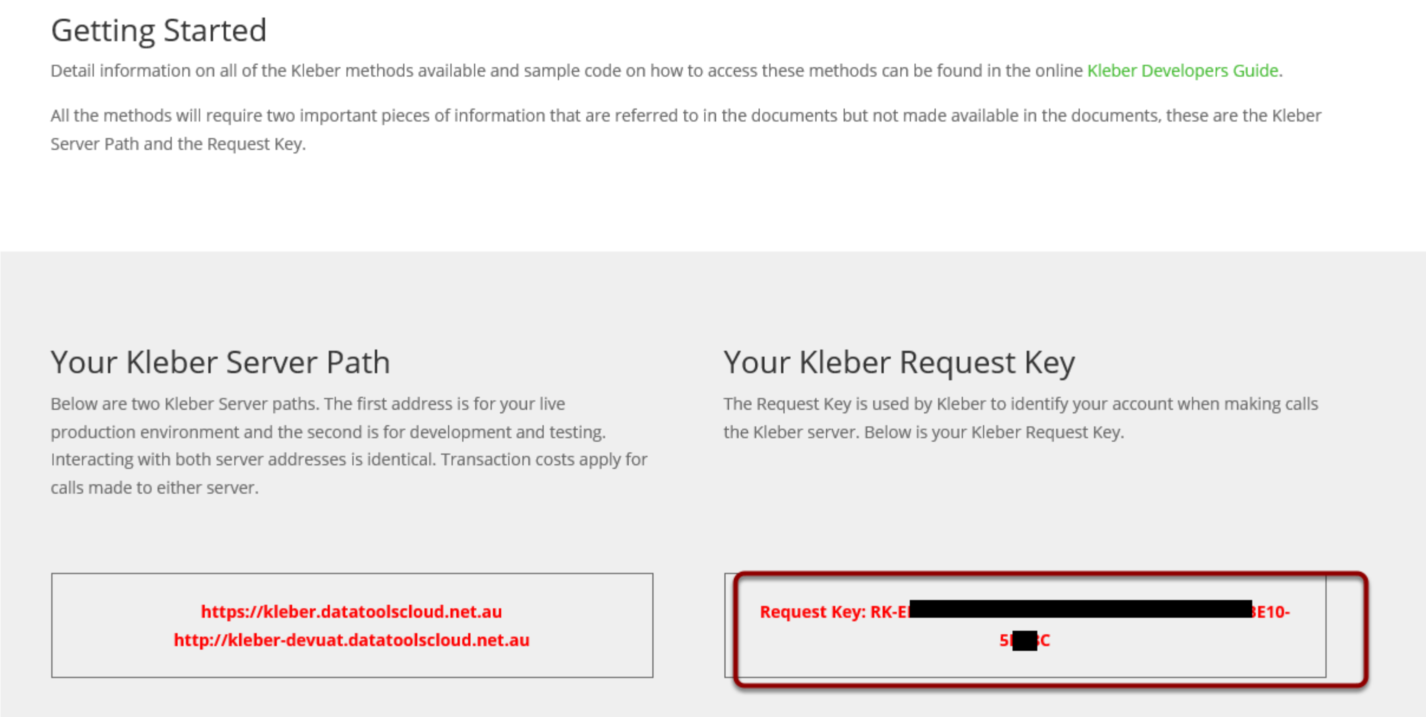
Enter your details in this and the following screen.

3. Setup Kleber API



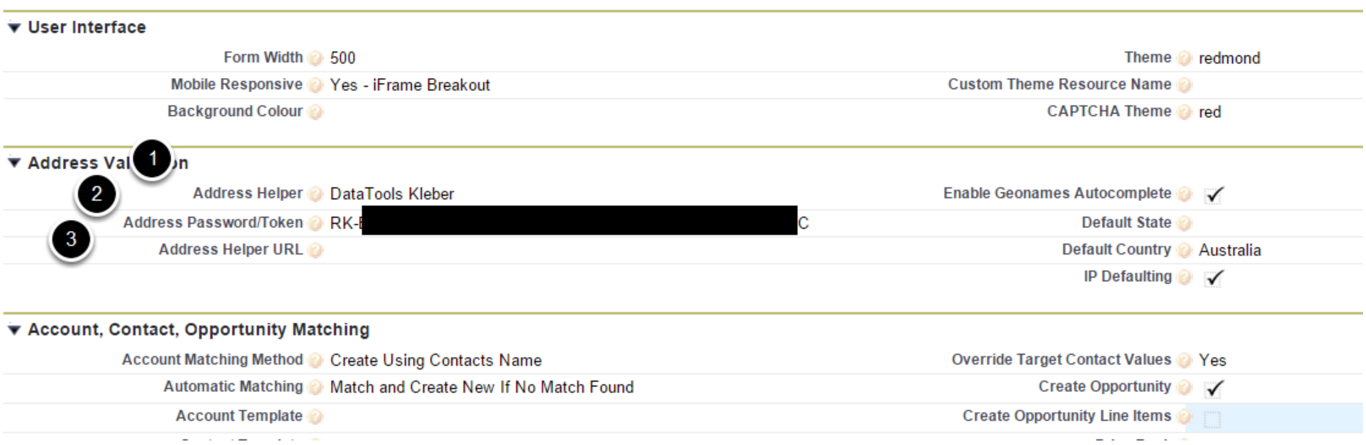
Click the "Start by Setting up your product link"

4. Copy the Kleber API



Copy the Request key as this needs to be entered into Salesforce Merchant Facility in the next step.

5. Update Salesforce with your Kleber Request Key



Navigate to the "Merchant Facility" Tab in Salesforce. Press GO button and and for Merchant Facility that you wish to have google DataTools Kleber Auto complete enabled update the following:

1. Set the Address Helper to DataTools Kleber
2. Update the Address Password/Token to be your Kleber Request key.

3. Leave the Address Helper URL as blank

Press Save

How to setup DataTools Kleber for Leads, Contacts and Accounts

Address auto-complete and validation is available for the following objects in Salesforce CRM:

- Leads
- Contacts
- Accounts

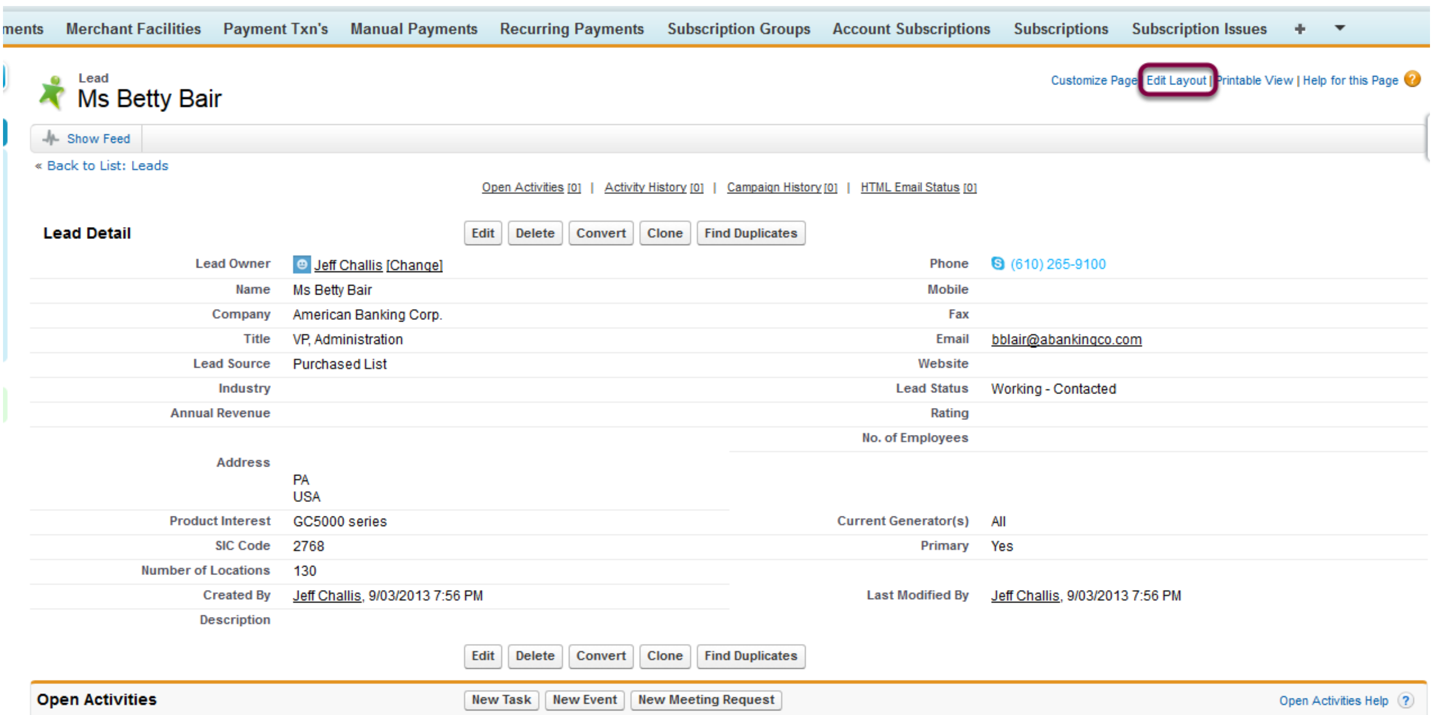
You must first have DataTools Kleber setup.

Quick Steps for installation:

- On the objects you wish to add validation, do the following:
- Edit the Page Layout
- Make standard address fields read only
- optionally add the Address Update Button
- optionally at the Address Update link below address fields

1. Adding address autocomplete and validation for Leads

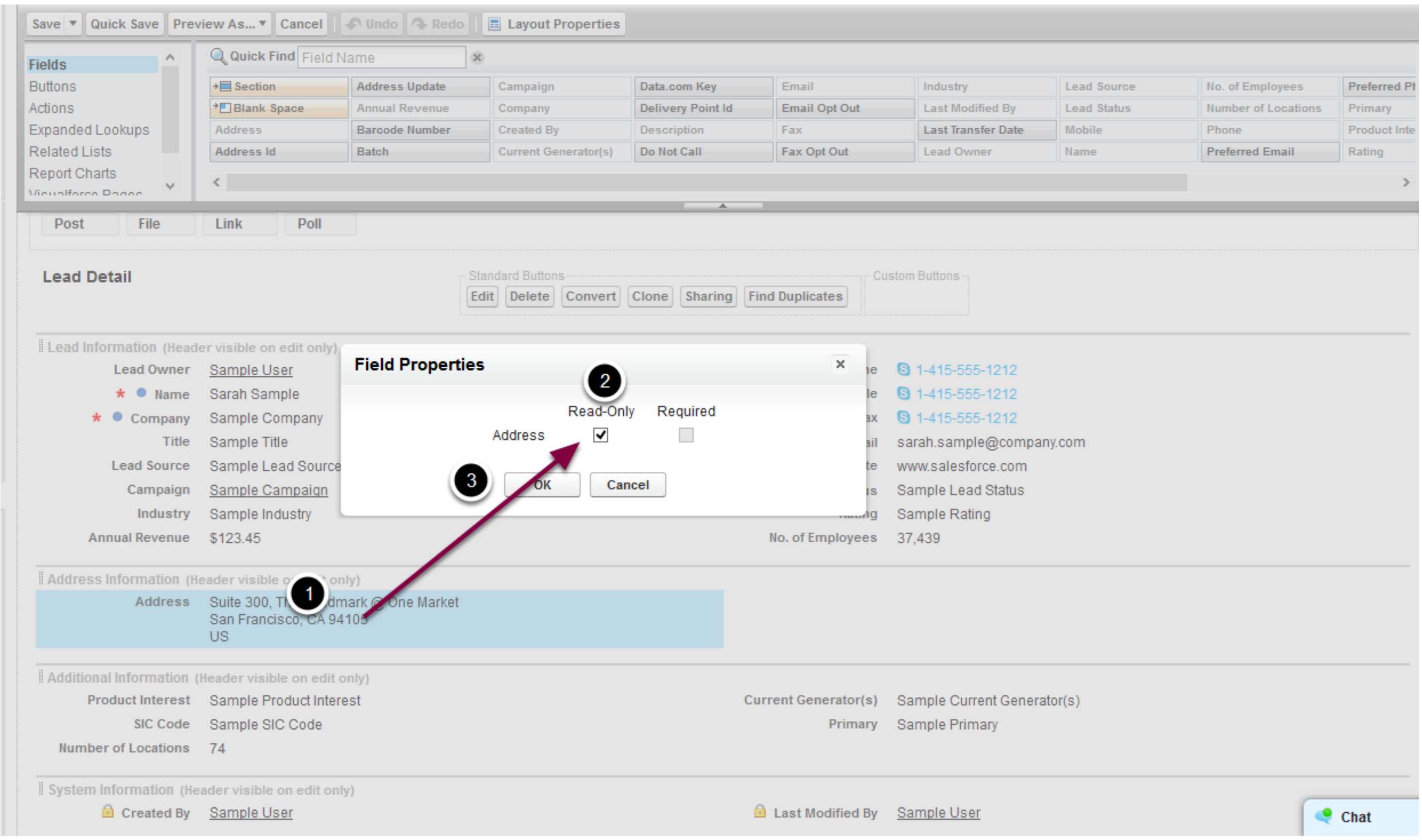
1.1 Edit the lead page layout



Locate a lead, click into the lead and press Edit Layout link.

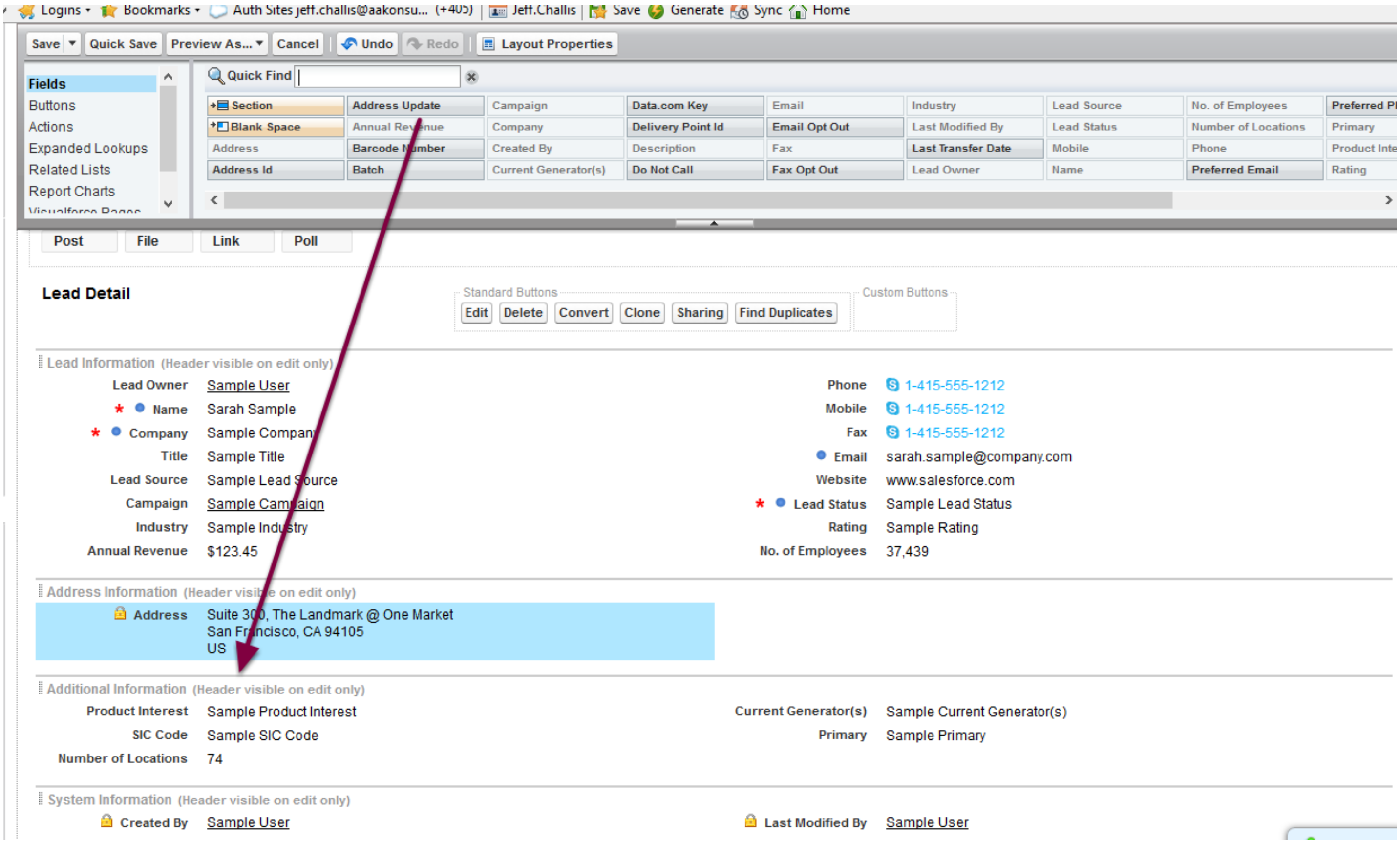
Alternatively, click on setup at the top to the screen, navigate to Customize > Leads > Page Layouts. Click edit next to the page layout you wish to update

1.2 Make address fields read only



1. Double click on the address field, or alternatively click on the spanner icon that appears when you hover over the address
2. Select Read Only
3. Click OK to exit

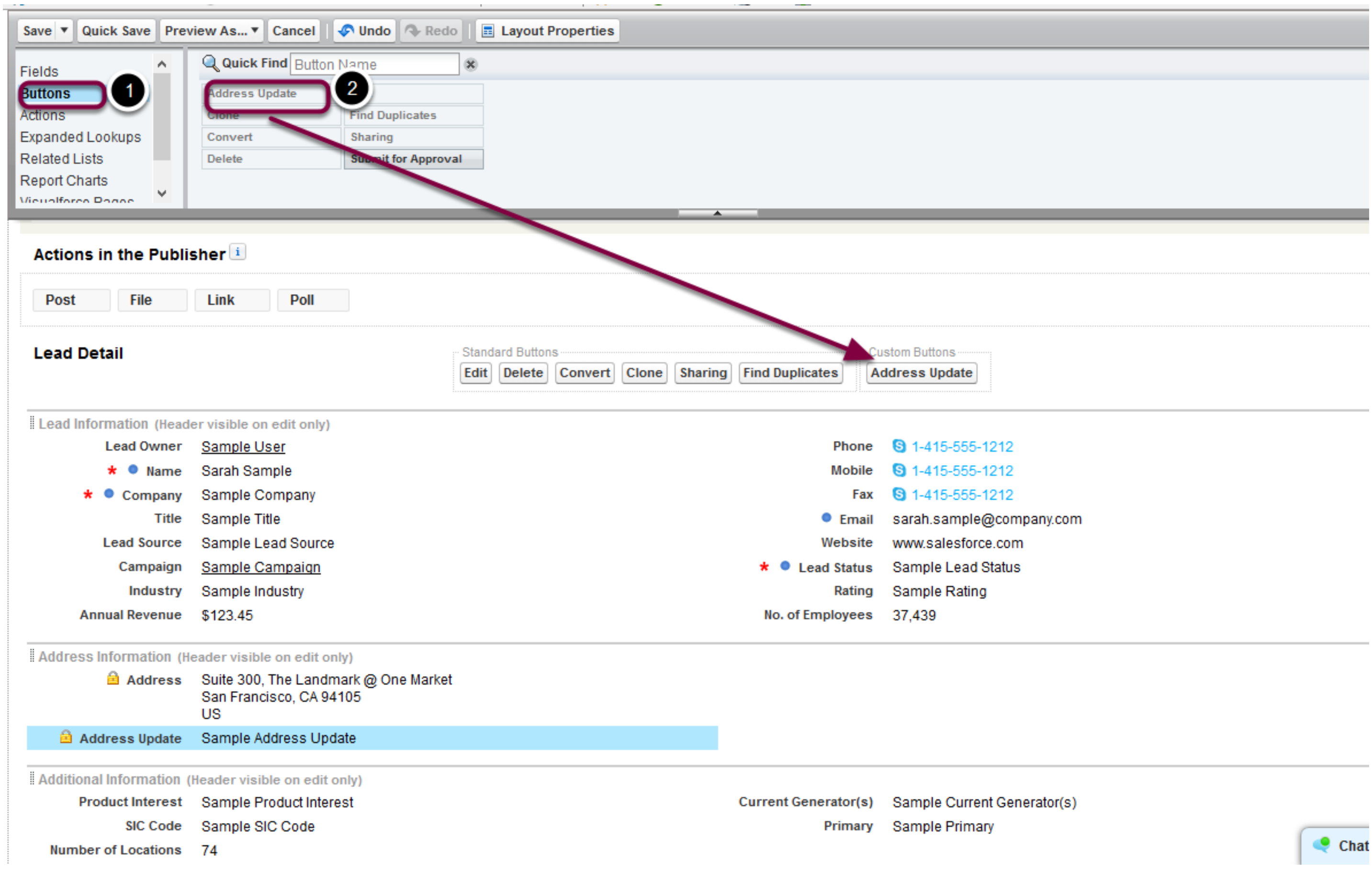
1.3 Add address update link



Click on the Address Update field and drag this below the address details.

This will provide a link where users can edit the address. You can use this with or without the Address Update button option

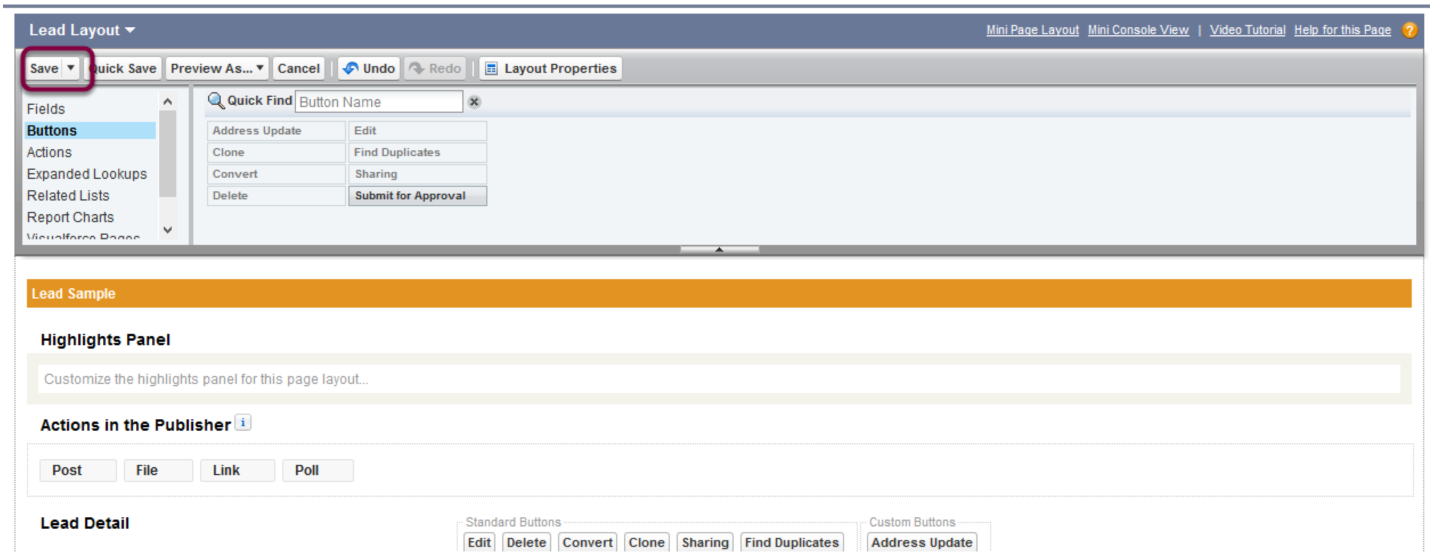
1.4 Add Address Update button



1. Click on the Buttons selection object
2. Drag Address Update button from the available buttons to the Custom Buttons Section

You can use this with or without the Address Update link option

1.5 Save the Page Layout

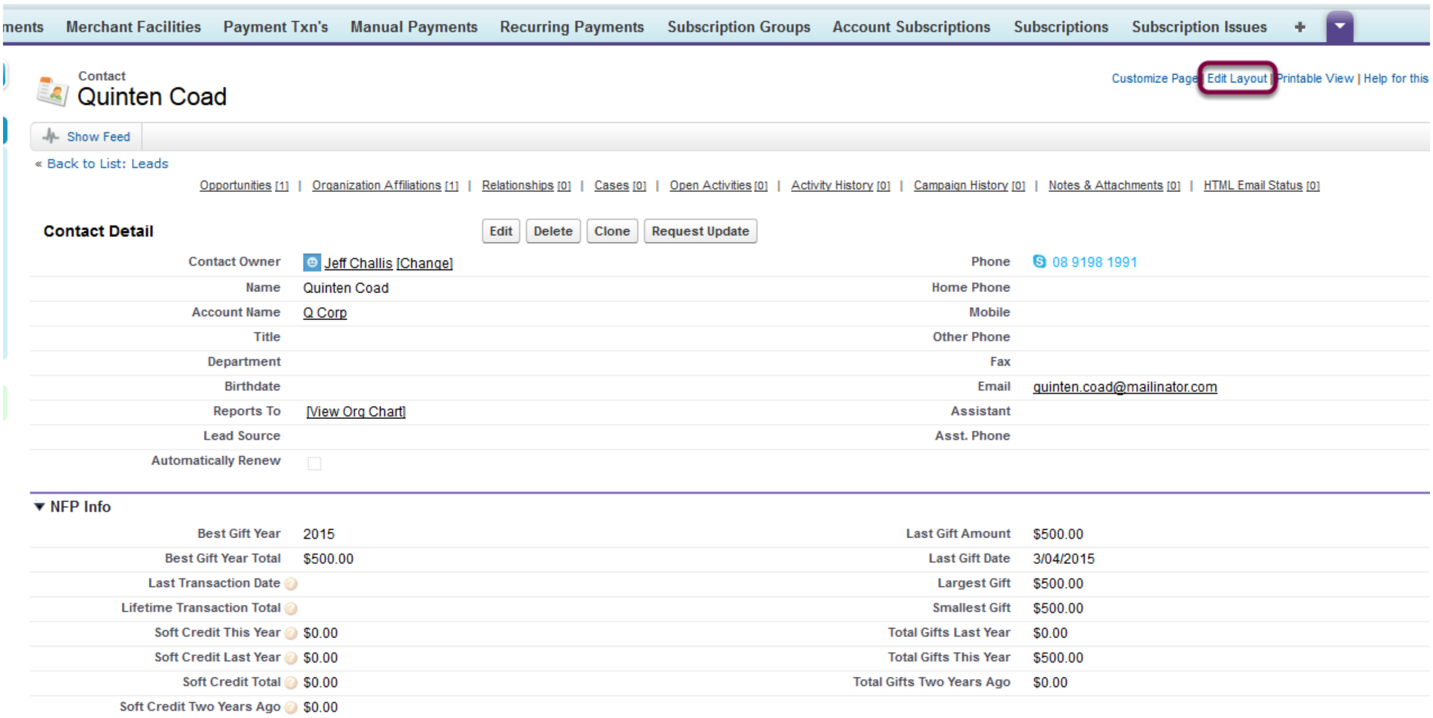


Make sure you press the Save button for closing the screen

You'll need to repeat this process for other layouts should they exist

2. Adding address autocomplete and validation for Contacts

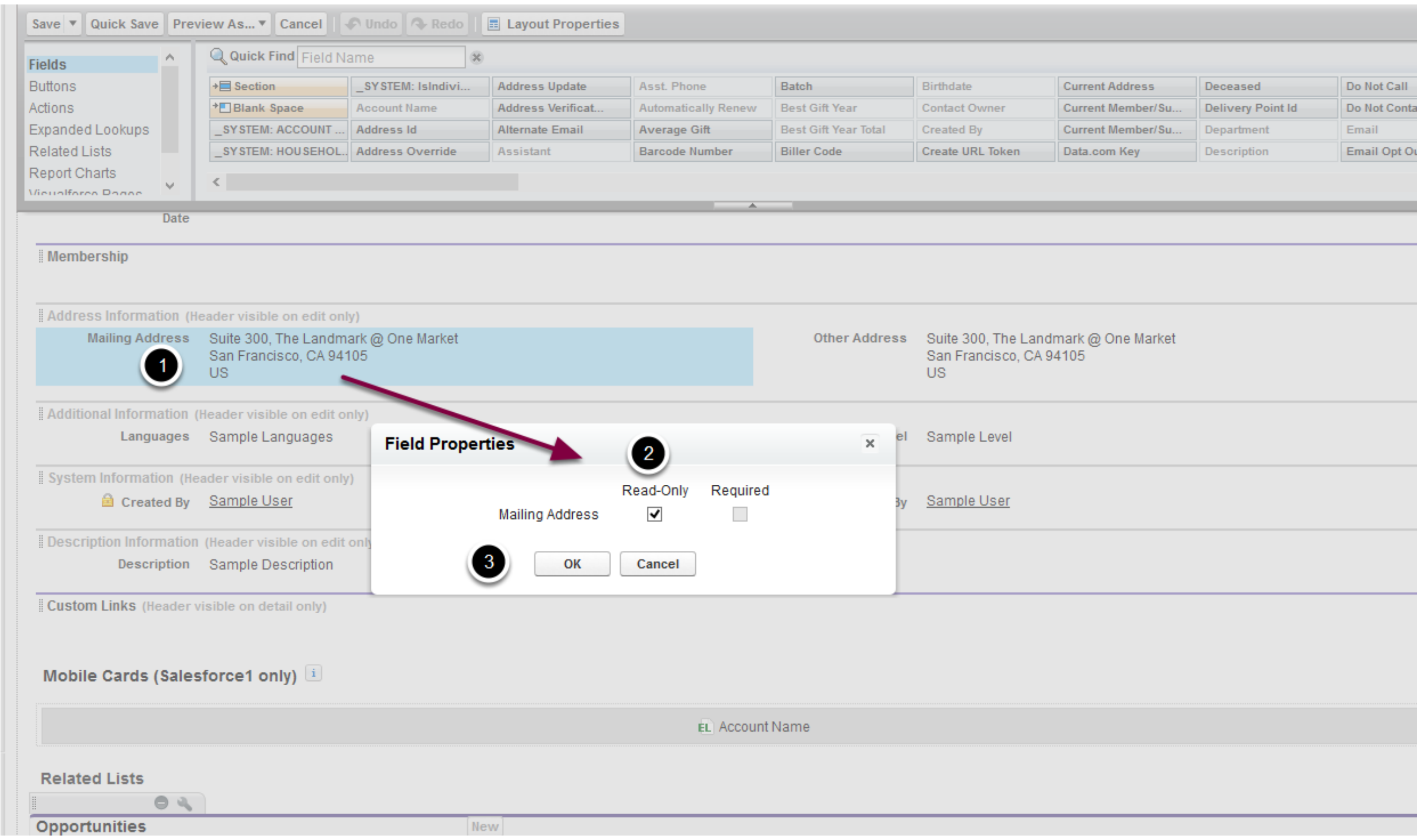
2.1 Edit the contact page layout



Locate a lead, click into the Contact and press Edit Layout link.

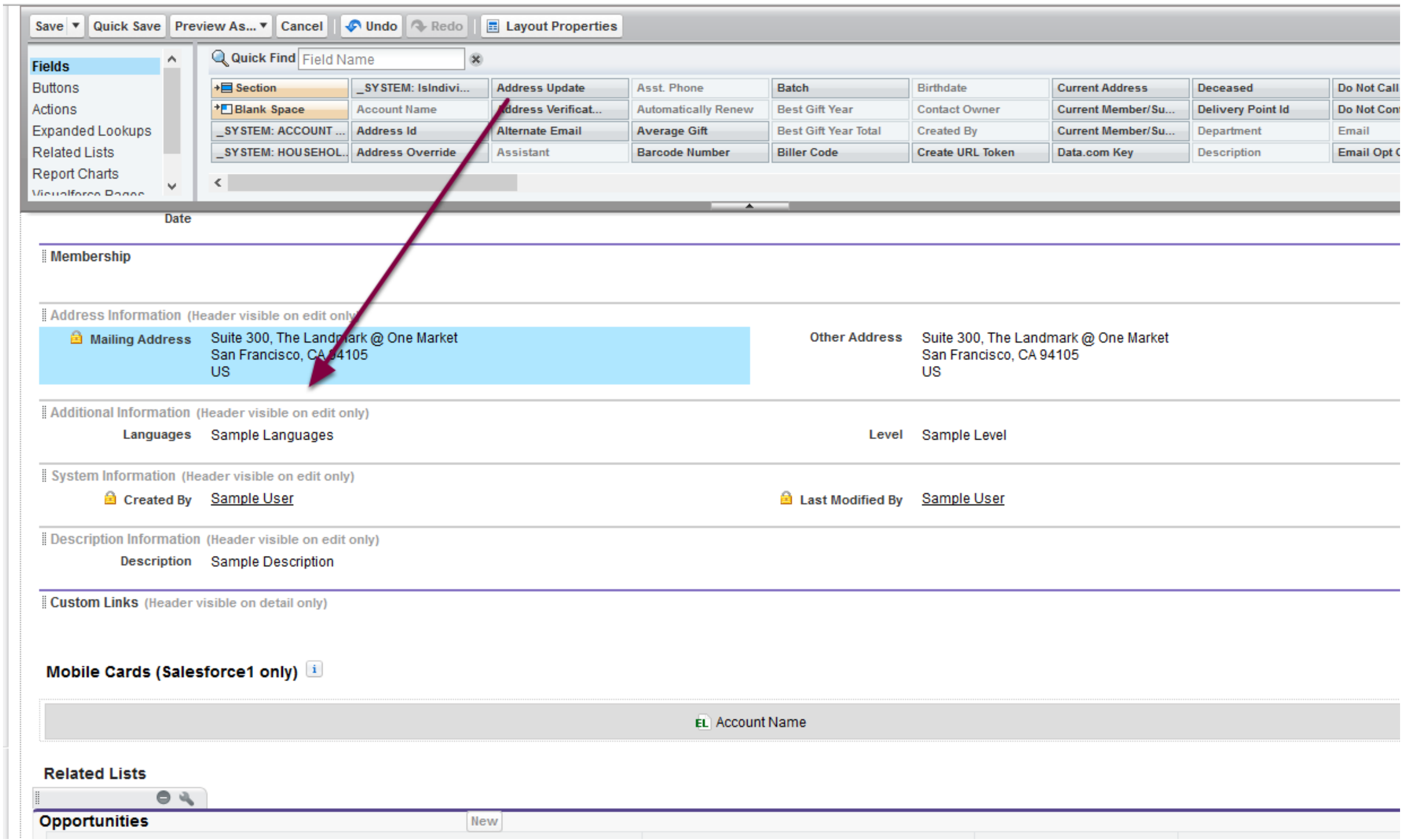
Alternatively, click on setup at the top to the screen, navigate to Customize > Contacts > Page Layouts. Click edit next to the page layout you wish to update

2.2 Make address fields read only



1. Double click on the address field, or alternatively click on the spanner icon that appears when you hover over the address
2. Select Read Only
3. Click OK to exit

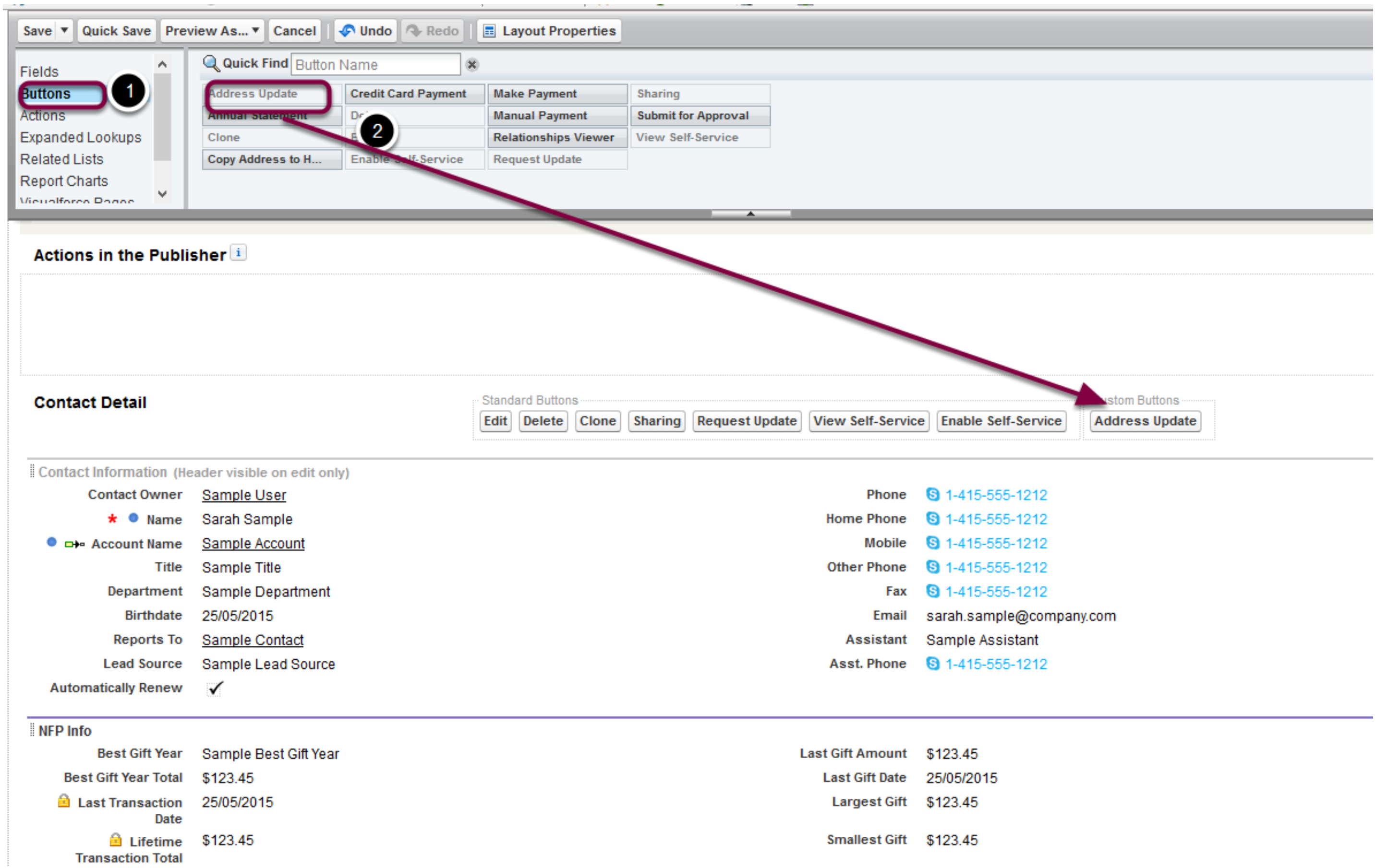
2.3 Add address update link



Click on the Address Update field and drag this below the address details.

This will provide a link where users can edit the address. You can use this with or without the Address Update button option

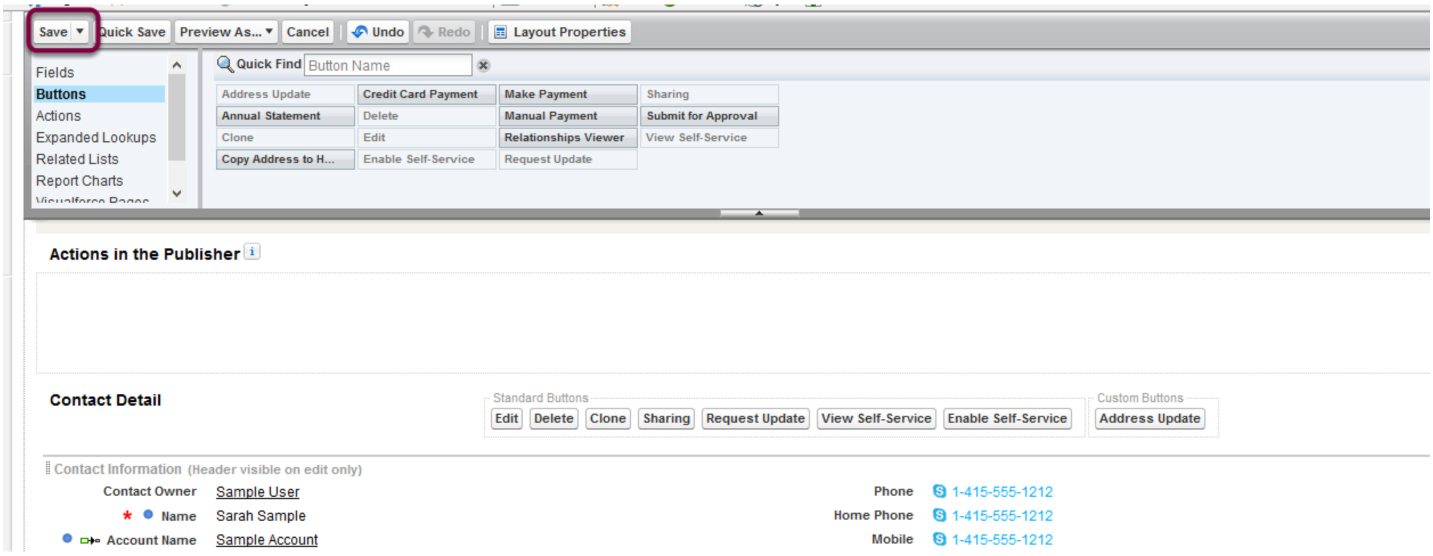
2.4 Add Address Update button



1. Click on the Buttons selection object
2. Drag Address Update button from the available buttons to the Custom Buttons Section

You can use this with or without the Address Update link option

2.5 Save the Page Layout

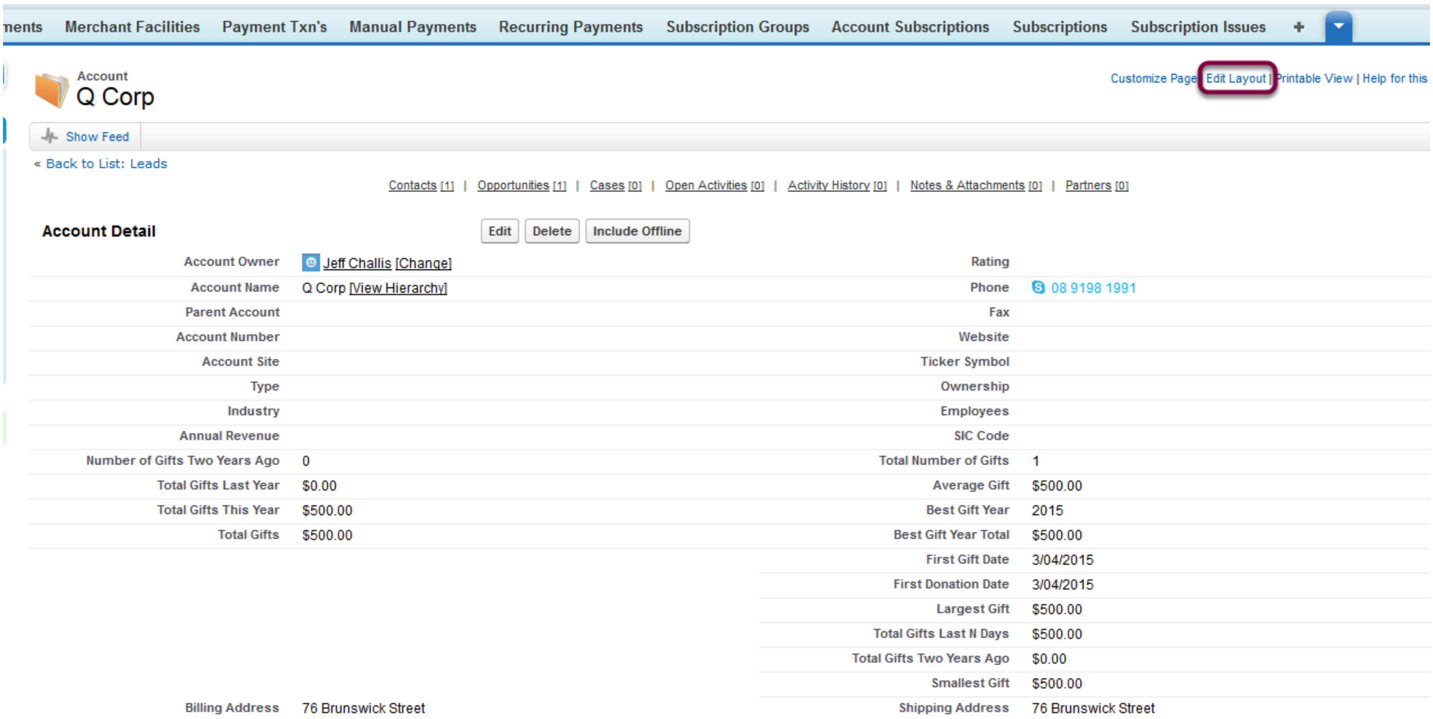


Make sure you press the Save button for closing the screen

You'll need to repeat this process for other layouts should they exist

3. Adding address autocomplete and validation for Accounts

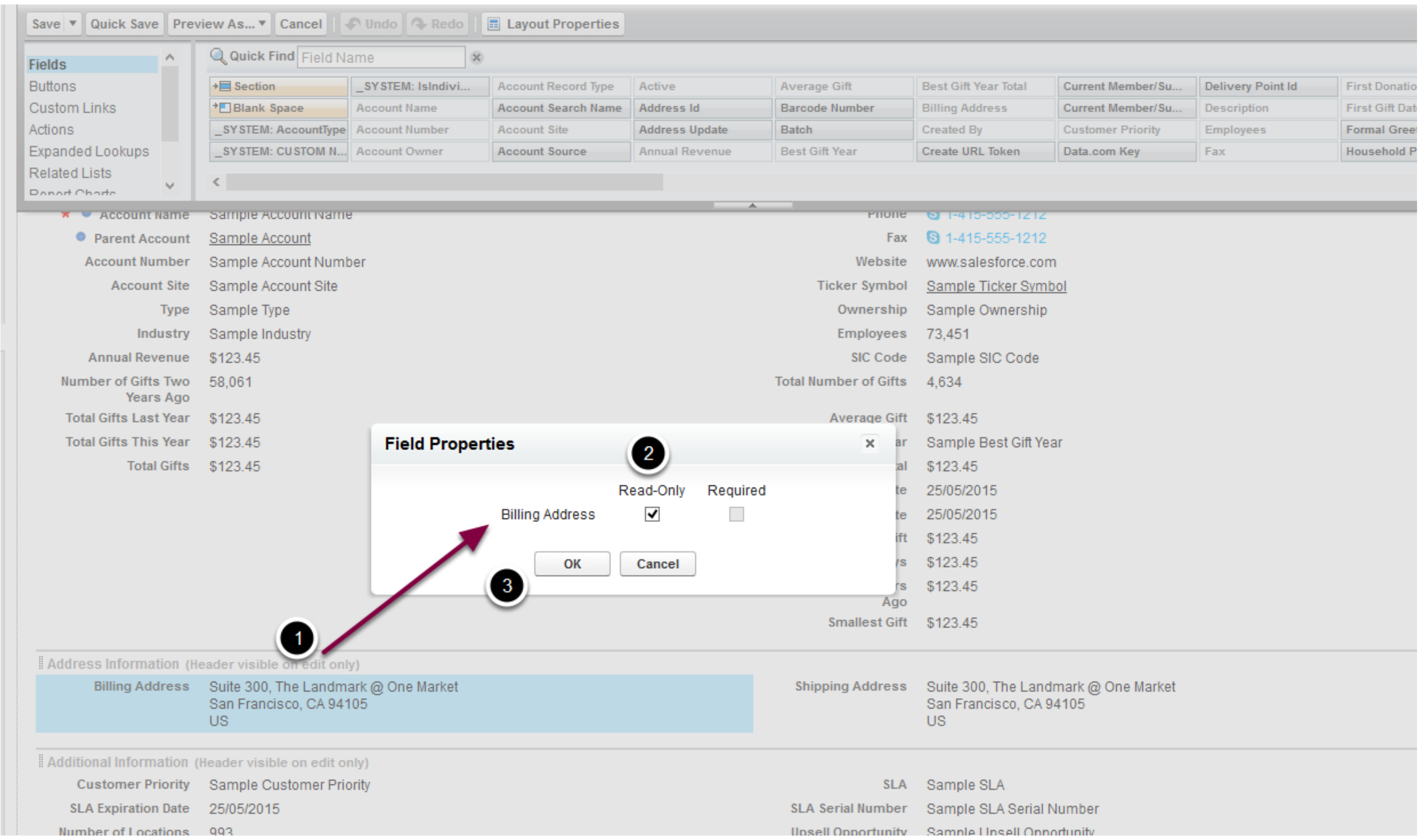
3.1 Edit the Account page layout



Locate a lead, click into the Contact and press Edit Layout link.

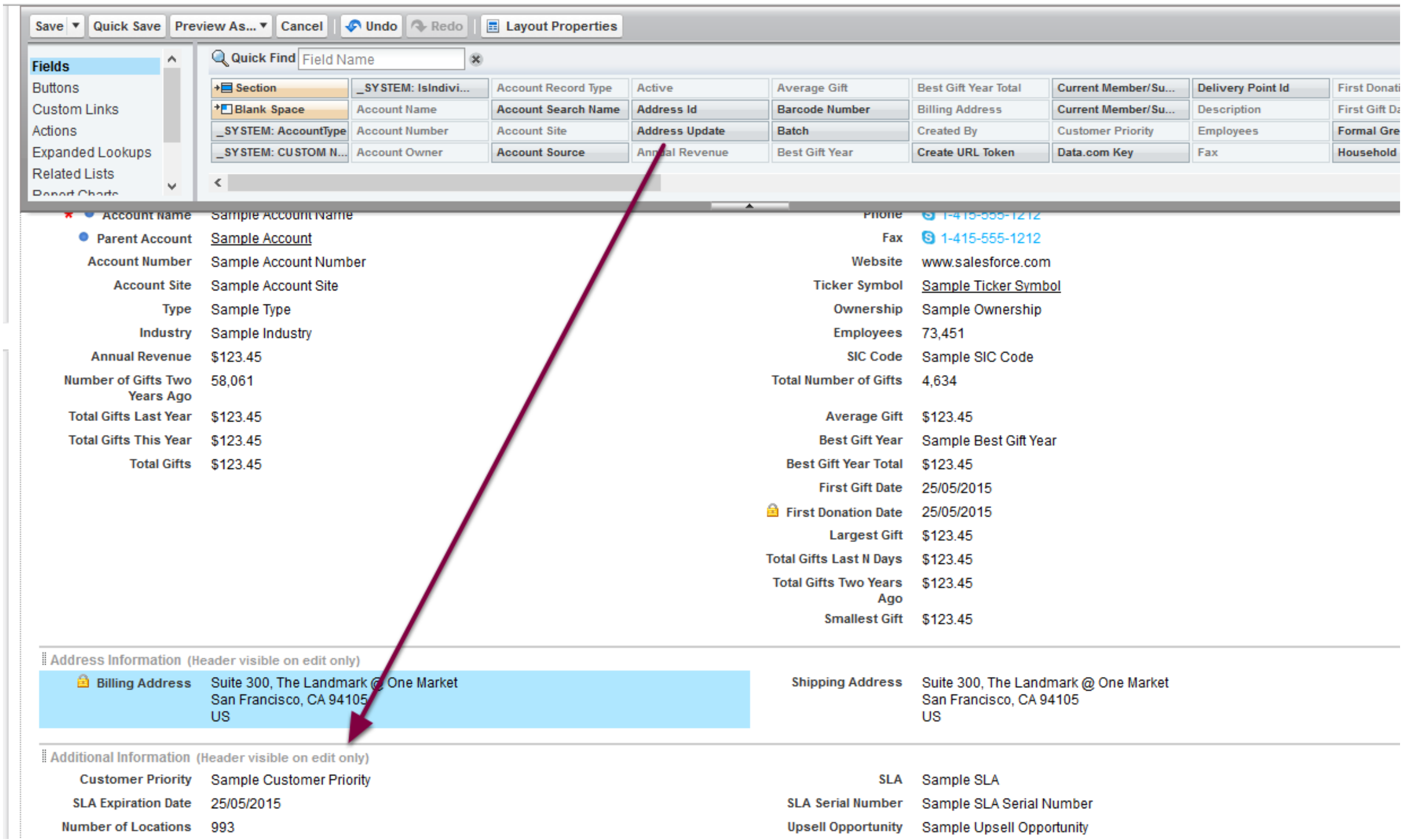
Alternatively, click on setup at the top to the screen, navigate to Customize > Accounts > Page Layouts. Click edit next to the page layout you wish to update

3.2 Make address fields read only



1. Double click on the address field, or alternatively click on the spanner icon that appears when you hover over the address
2. Select Read Only
3. Click OK to exit

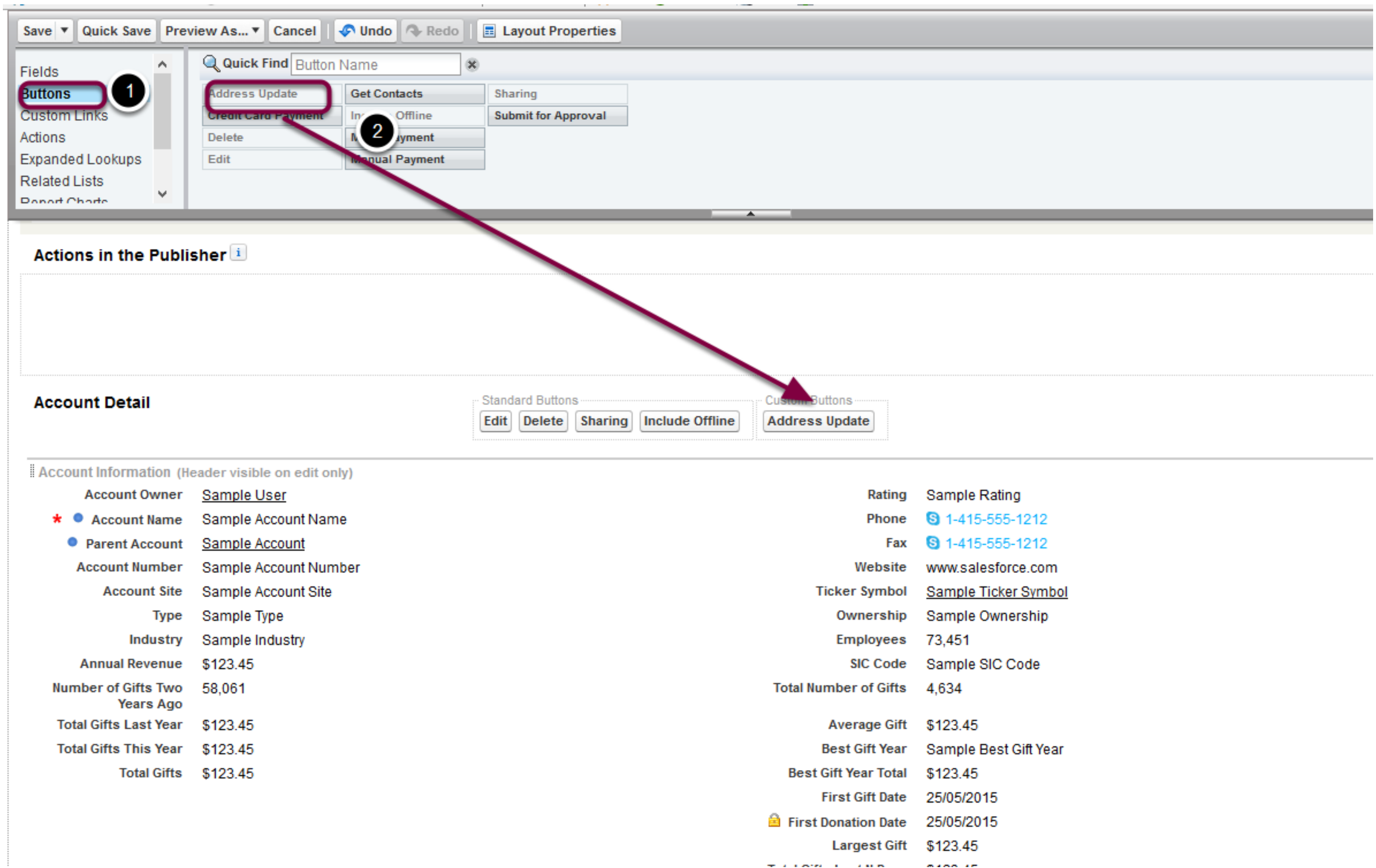
3.3 Add address update link



Click on the Address Update field and drag this below the address details.

This will provide a link where users can edit the address. You can use this with or without the Address Update button option

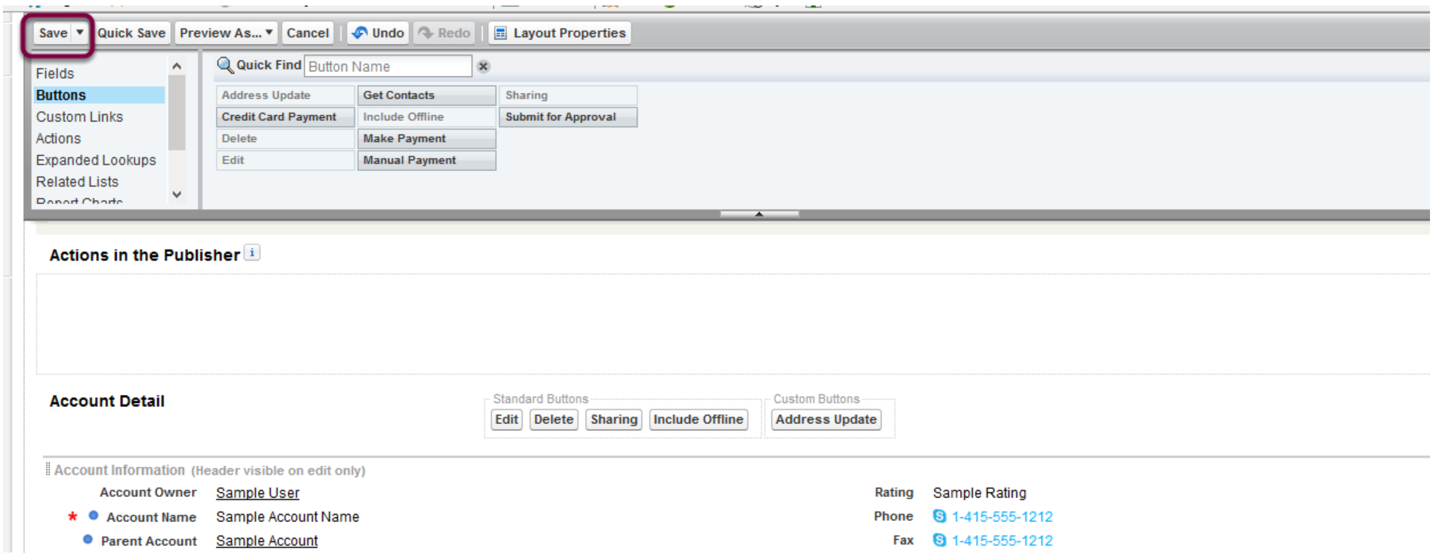
3.4 Add Address Update button



1. Click on the Buttons selection object
2. Drag Address Update button from the available buttons to the Custom Buttons Section

You can use this with or without the Address Update link option

3.5 Save the Page Layout



Make sure you press the Save button for closing the screen

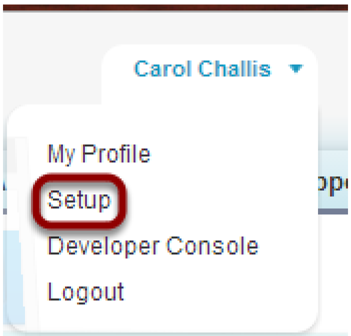
You'll need to repeat this process for other layouts should they exist

Customisation - Optional

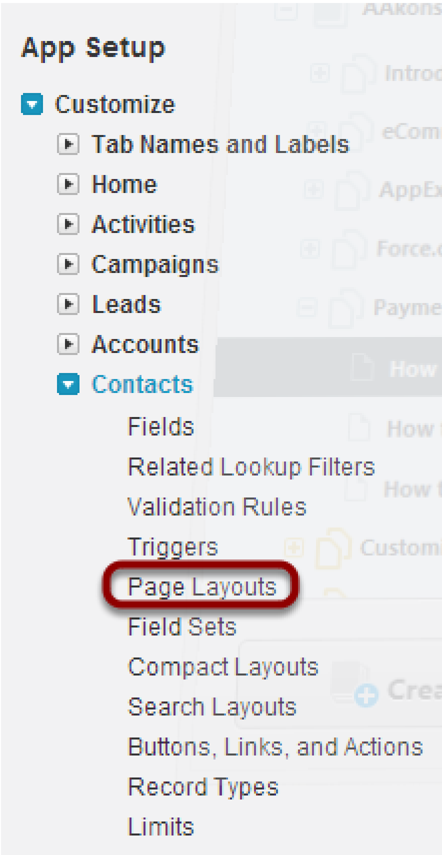
How to adjust the Contacts Page layout

It can be useful to have extra information on a preferred screen

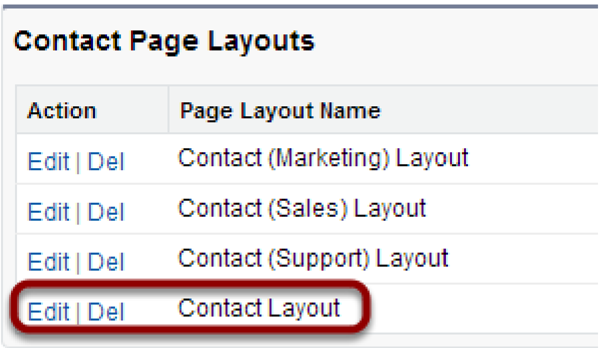
1. Navigate to Setup > App Setup > Customise > Contacts > Page Layouts



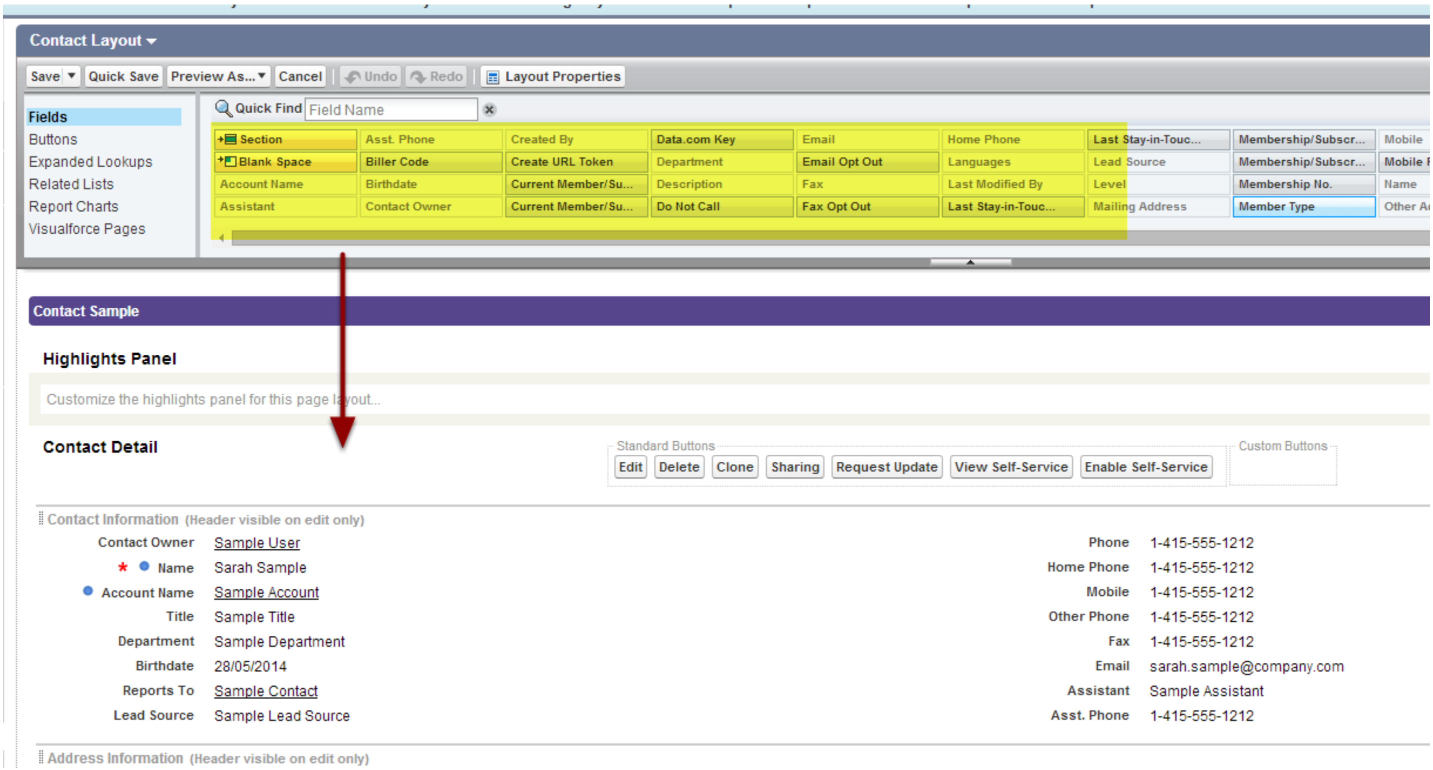
1.1 Select App Setup > Customise > Contacts > Page Layouts



2. Select 'Edit' on 'Contact layout'

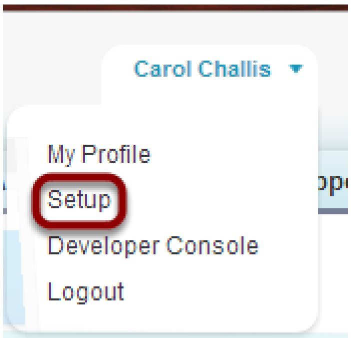


3. Drop and drag a field button onto the Contact Detail page



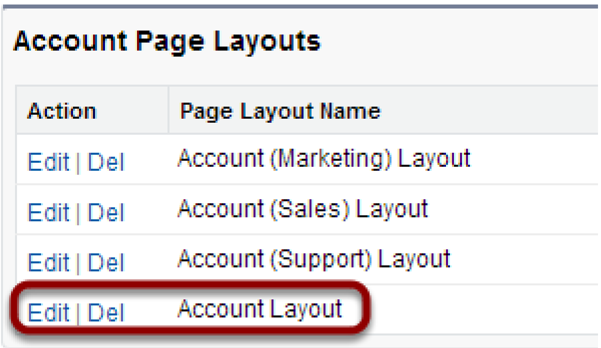
How to adjust the Accounts Page layout

1. Navigate to Setup > App Setup > Customise > Accounts > Page Layouts

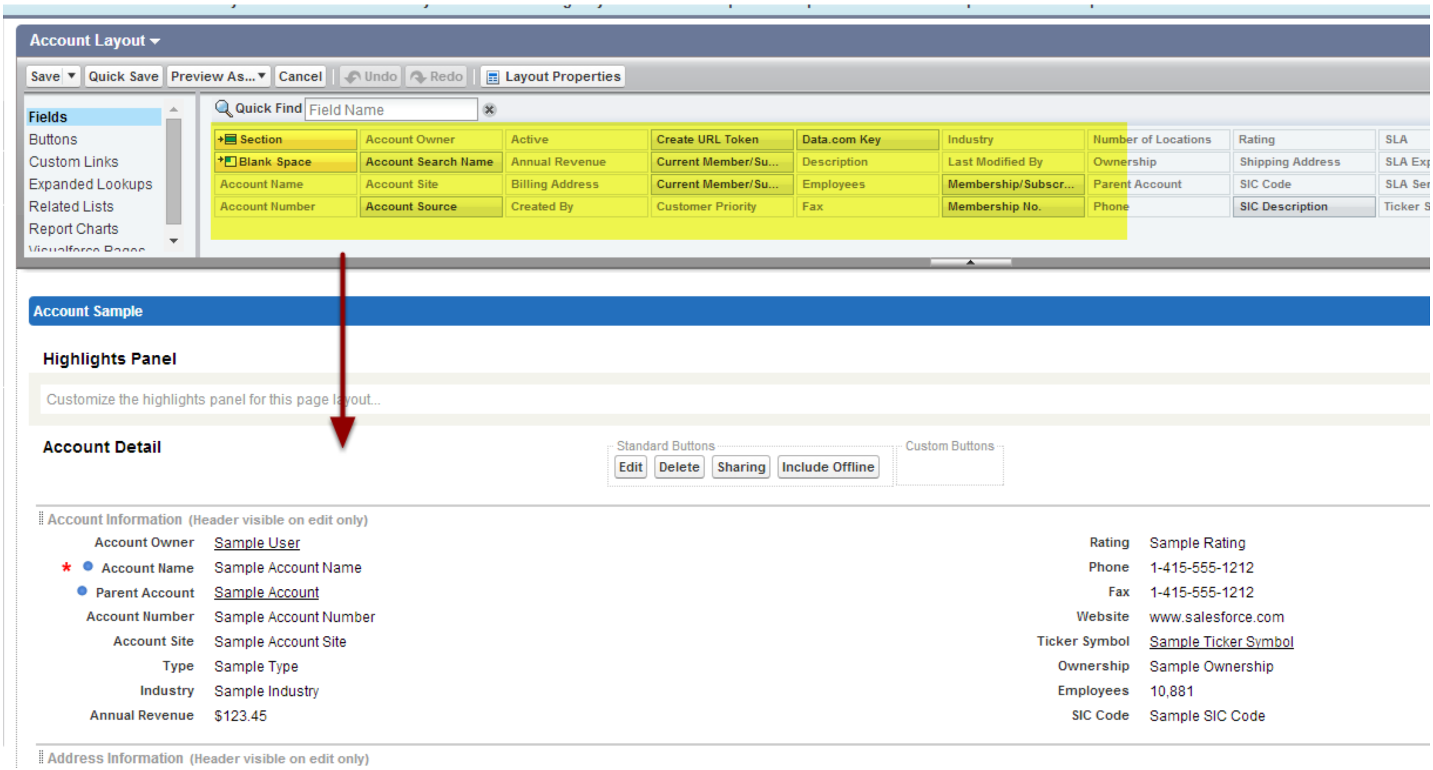


1.1 Select App Setup > Customise > Accounts > Page Layouts

2. Select 'Edit' on 'Account Layout'



3. Drop and drag a field button onto the Account Detail page



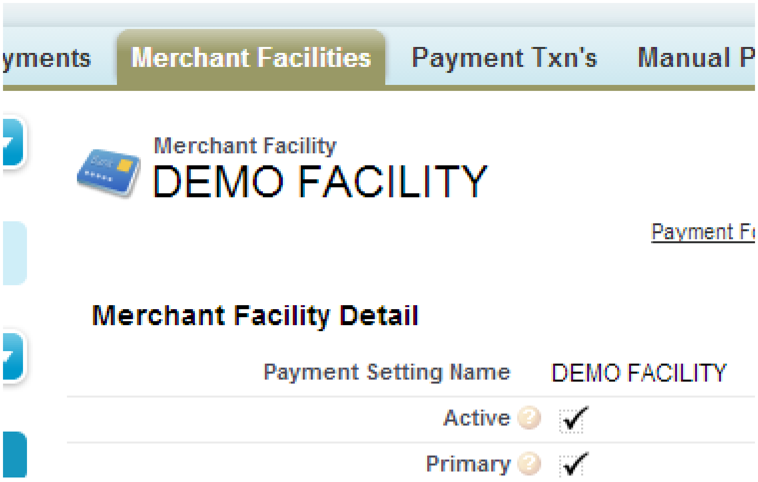
How to adjust settings for the Not-for-profit Starter Pack

AAkonsult Payments has been tested and works with the Nonprofit Starter Pack (available from Salesforce) with the following notes.

Disclaimer: Salesforce Foundation is constantly updating the Nonprofit starter pack and we cannot guarantee that this updates will never have an adverse affect on AAkonsult Payments. Please ensure testing new options and updates in Sandbox before deploying to production.

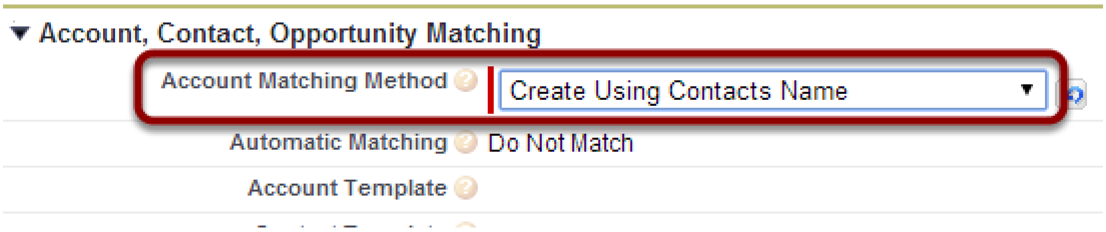
1. Activate the Not-for-profit Starter

1.1 Navigate to the Merchant Facility tab

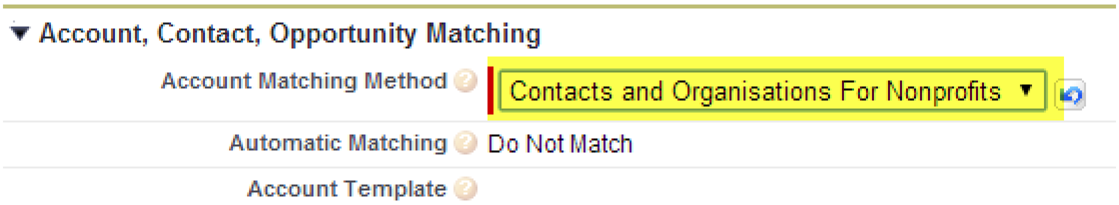


1.2 Scroll down to Account, Contact, Opportunity Matching heading

1.3 Double click into the Account Matching Method field



1.4 Select 'Contacts and Organisations For Nonprofits' from the drop down menu and SAVE

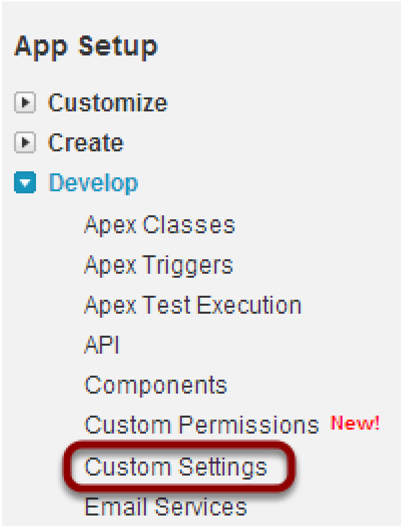


2. Allow Household settings

For organisations using the NPSP version 2 or earlier, there is a requirement to disable the Household Opportunity Rollup trigger. This will mean that contact and account roll-up summary fields will only be recalculated once per day.

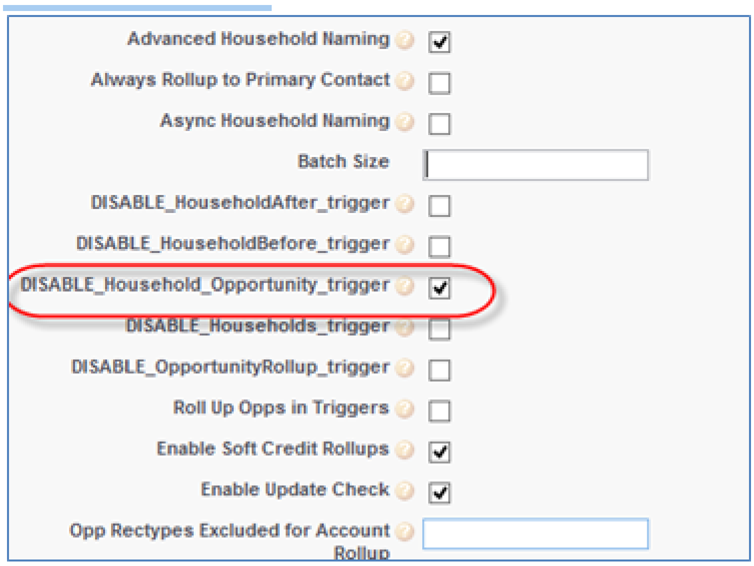
If you are using versino 3 of the NPSP or later then you do NOT need to disable this trigger.

2.1 Navigate to Setup > App Setup > Develop > Custom Settings



2.2 Select Manage next to 'Household Settings'

2.3 Untick the checkbox for 'DISABLE_Household_Opportunity_trigger' field

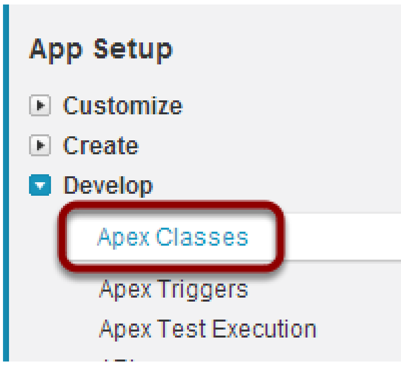


3. Schedule Roll-up processor to automatic

The Batch Payment Processor (started on the Merchant Facility Tab) is not compatible with this part of the Nonprofit Starter pack for versions 2.0 or earlier.

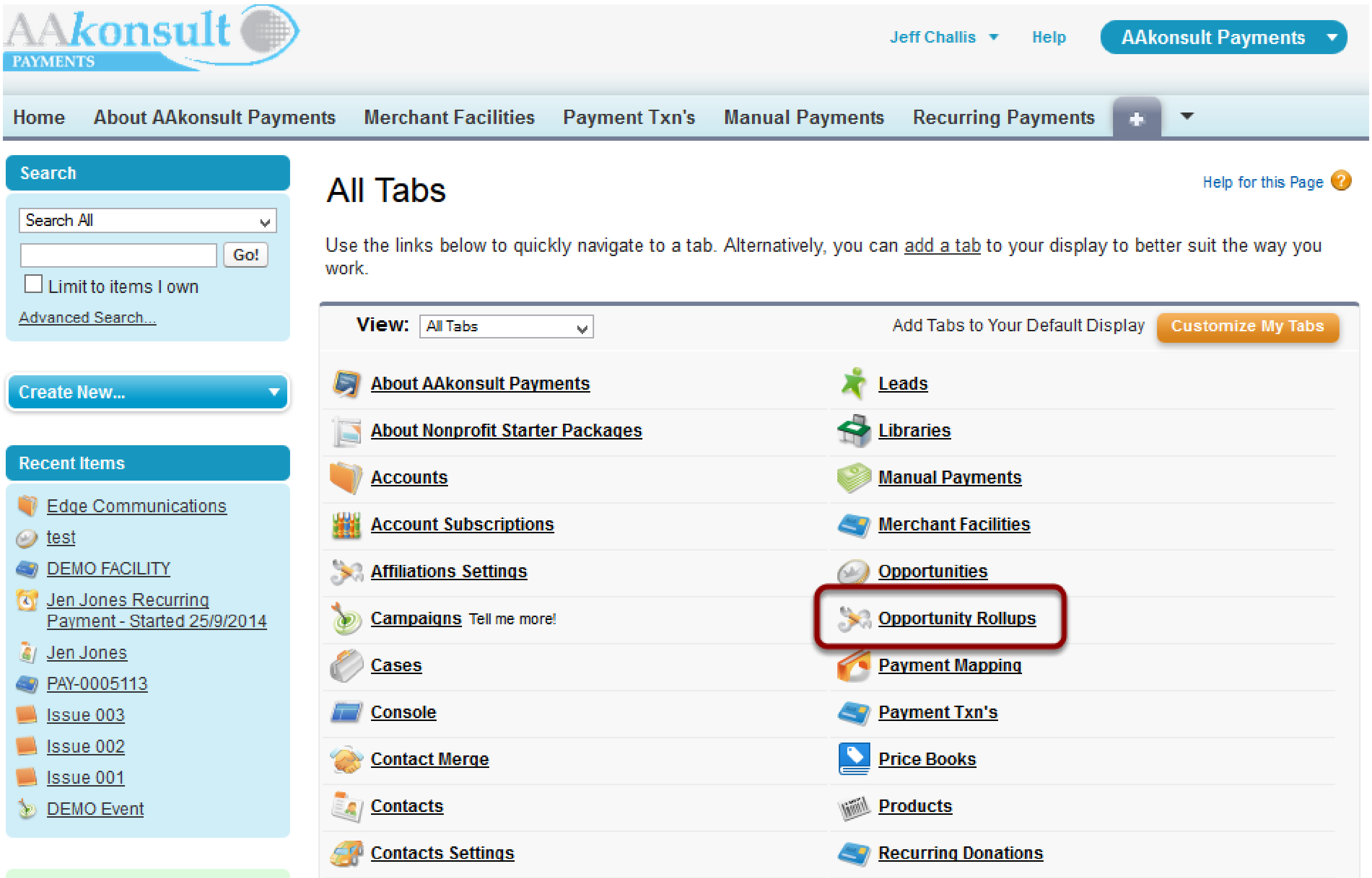
The below steps enable the scheduling of the roll-ups so totals on Accounts and Contacts get re-calculated daily.

3.1 Navigate to Opportunity Roll-ups Tab

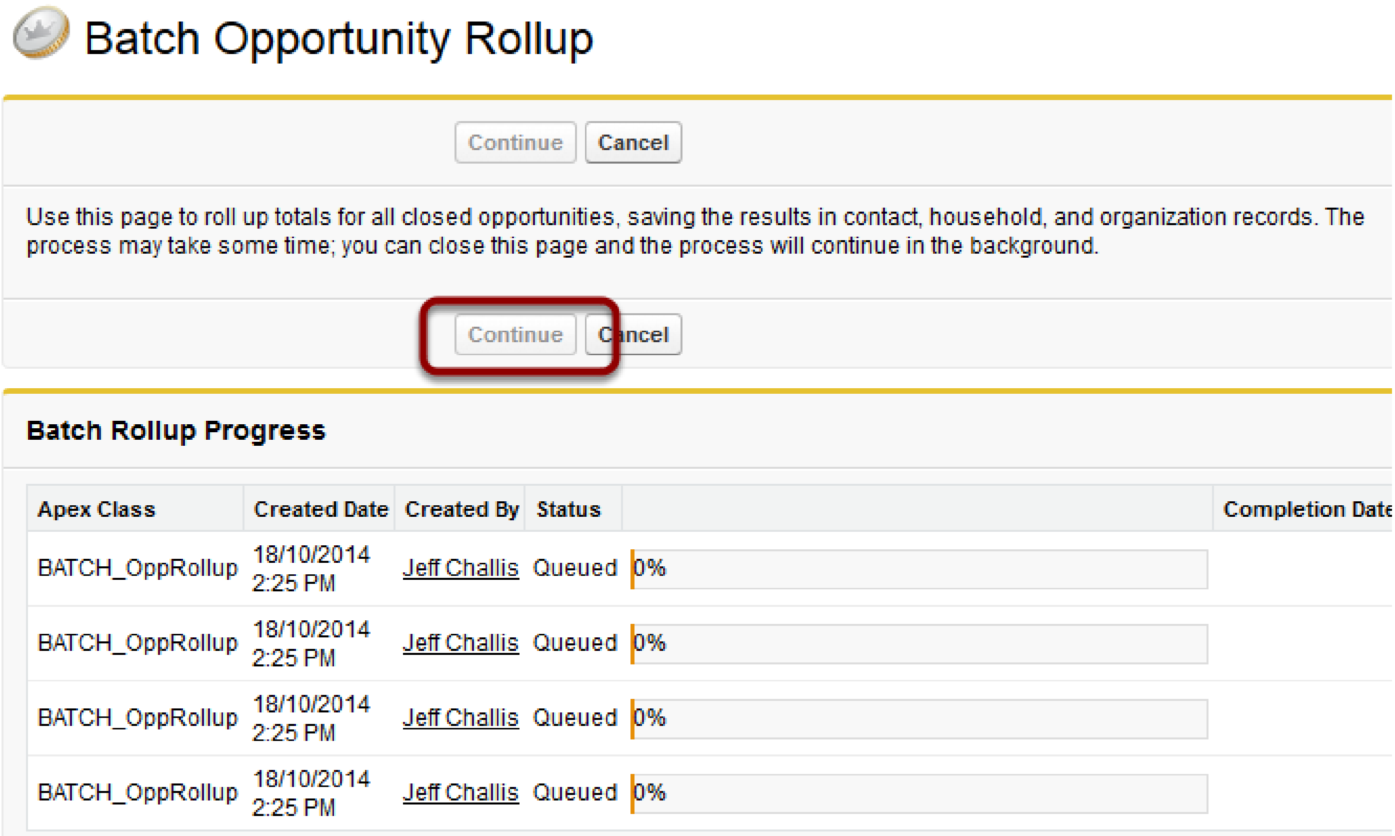


Click "+" at the end of the Tabs, the select Opportunity Rollups

3.2 All Tabs ~ salesforce.com - Developer Edition - Mozilla Firefox



3.3 Select Apex Class 'SCHED_OppRollup'



Press the Continue button to start run now. This will run the calculation now and will schedule the calculation to occur each day.

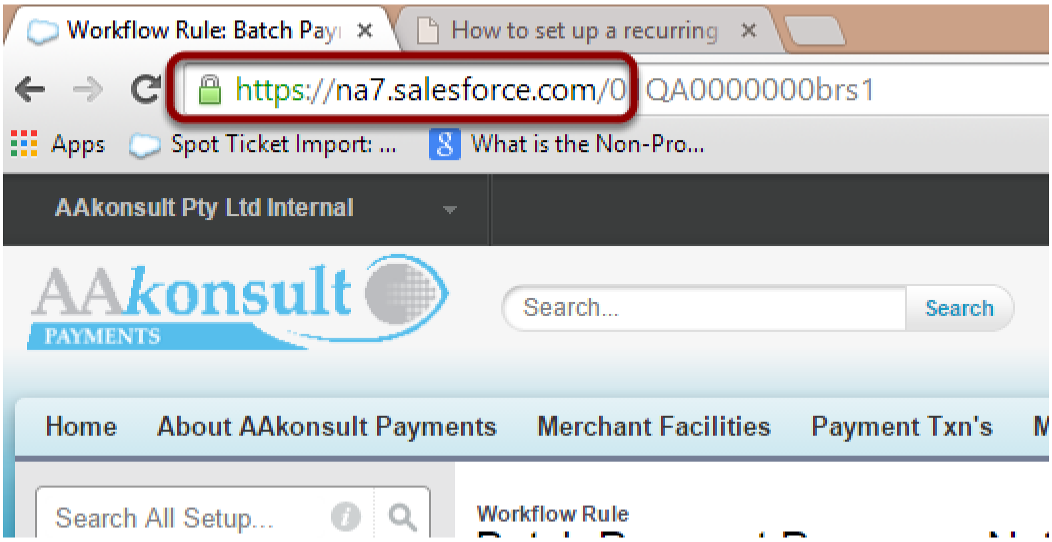
How to setup Annual Statements

In order to use the Annual Statements, you need to setup a Remote Site setting that AAkonsult Payment to mass generate the Annual Statement PDF documents.

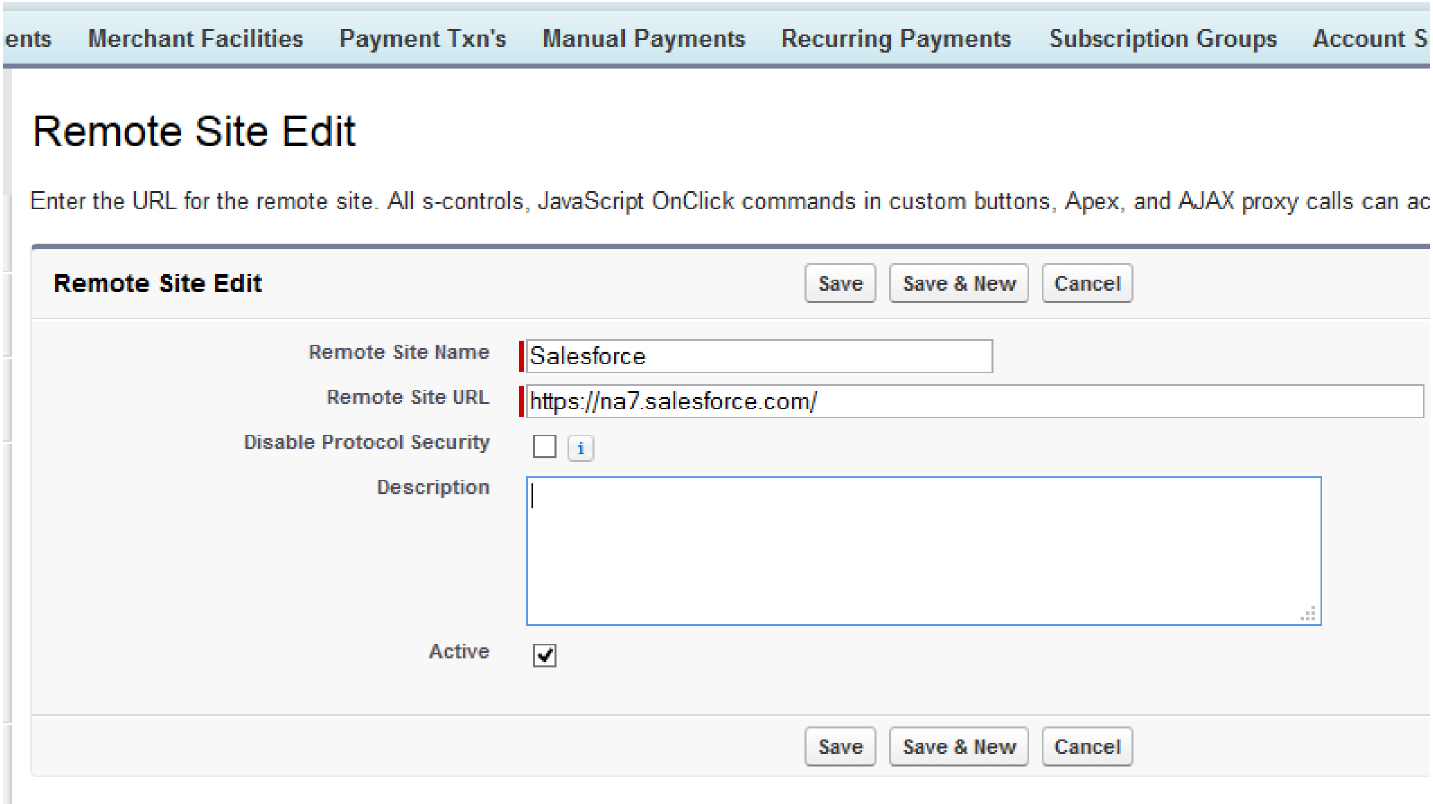
Quick Steps:

1. Copy the salesforce.com domain from the URL
2. Add a new Remote Site setting for the salesforce domain

1. Copy the Salesforce URL from any screen



2. Navigate to setup > Administration setup > Security Controls > Remote Site Settings



Add a new Remote Site.

Enter a name “Salesforce”, then paste the URL from step 1 into the Remote Site URL, select active and Save.

Workflows - Optional

Which workflow will suit?

Workflow rules are actions happening behind the scenes in Salesforce that are triggered by an event or time.

AAkonsult has a variety of workflow rules that can be activated for your organisation depending upon its needs.

For receipting workflows, please check the Payment Form Send Receipt by Options first before amending. More information is available in the user manual under Receipting section.

Memberships

If you are a membership based organisation, these workflows are recommended

- Renewal reminders to individuals - How to send out first automated reminders - contact level and How to send out second automated reminders - contact level
- Renewal reminders to organisations - How to send out first automated reminders - account level and How to send out second automated reminders - account level

Refunds

If your organisation is looking for some basic approval refunds, these workflows are recommended

- Refund Approvals

Notifications and Alerts

There are a number of pre-built notifications and alert workflows that are enabled by default.

The following are options that organisations can choose to enable should the need arise

- New Online Payment Notification
- New Online Membership Payment Notification

Recurring Payments

If your organisation relies on recurring payments, these workflows are recommended

- How to set up recurring payments
- How to set up a recurring payment restart reminder

Batch Processing

If you use batch processing, it is very useful to have these workflow rules set up if the processing is stopped.

- If you need to deliberately stop the batch process, this workflow reminds you to restart it - How to set up the batch payments process restart reminder
- If the batch process stops unexpectedly, this workflow sends a notification to let you know - How to set up the batch payments process not running notification

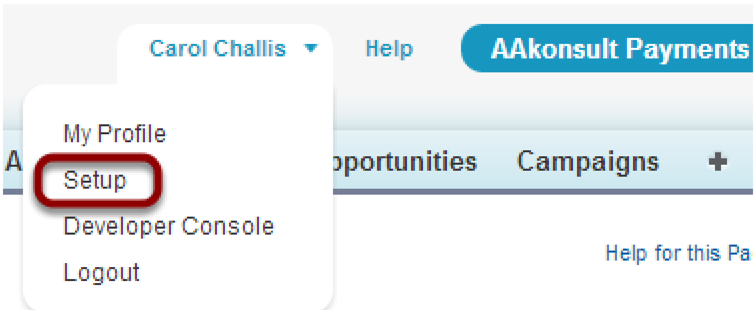
How to send out first automated reminders - contact level

This workflow setup is required if you wish to send out a first automated reminder to Contact level members/subscribers.

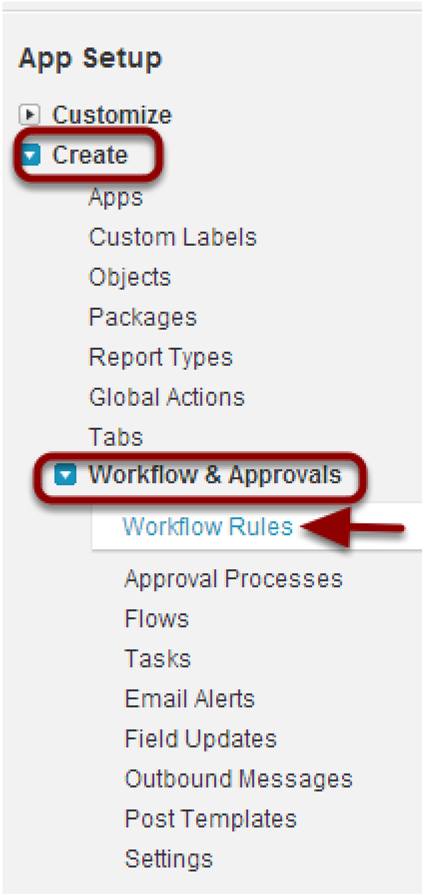
Quick Steps:

1. Clone Workflow rule "1st Renewal Reminder [ADD TIME BASED WORKFLOW]" and rename to "1st Renewal Reminder"
2. Add Immediate Workflow Actions. Select Existing - Field Update "set 1st Reminder Due"
3. Add a Time-Dependant Action. Set it to fire 30 days before subscription end date (or time period you would like).
   Add Action - use existing workflow - "Email Alert: send 1st Renewal Reminder Email"
   Add Action - use existing workflow - "Field Update: set 2nd Reminder Due"
4. Optionally review and update the renewal email templates

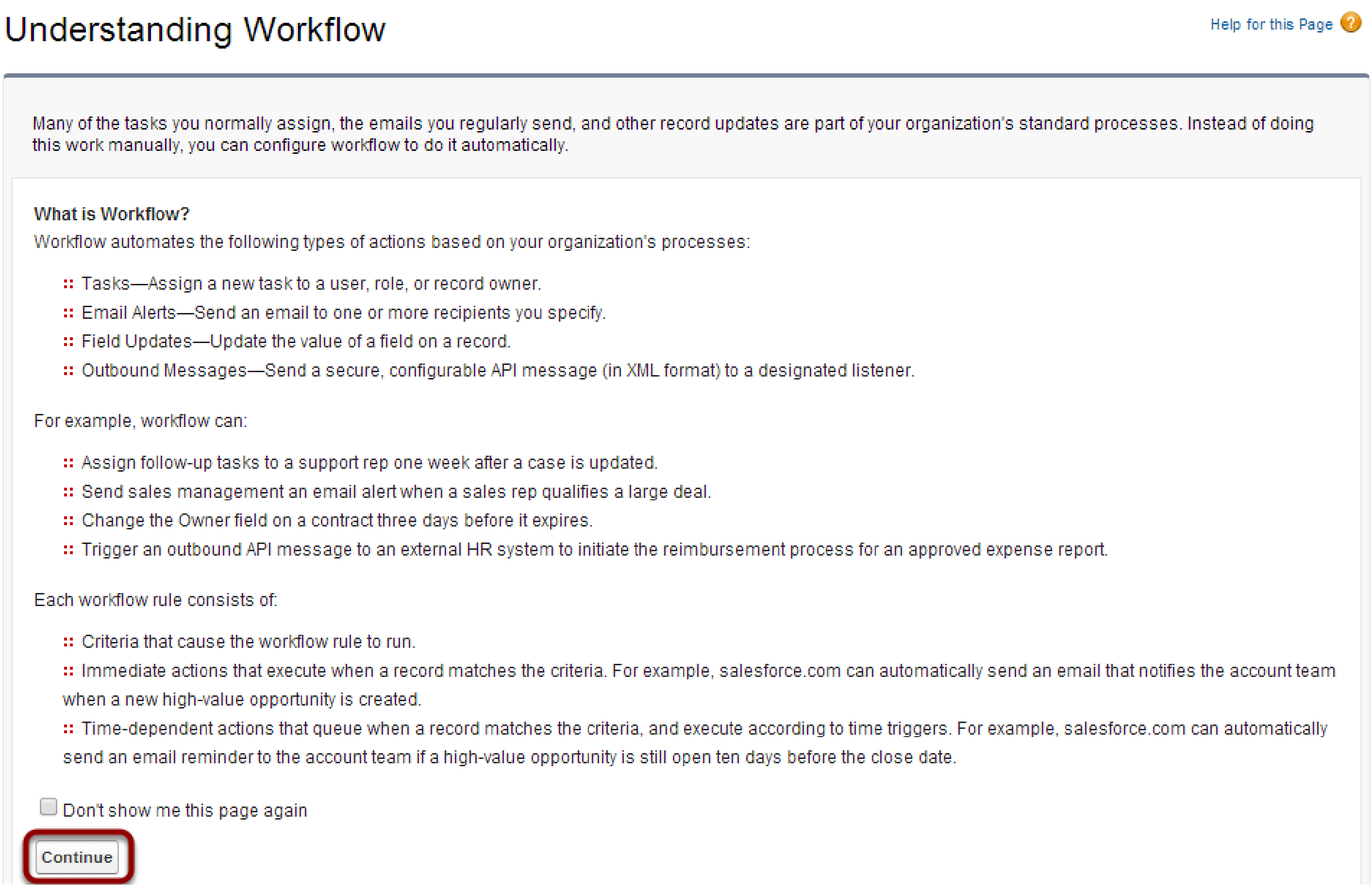
1. Navigate to Setup > App Setup > Create > Workflow & Approvals > Workflow Rules



1.1 Select 'Workflow Rules'



2. Read about Workflows and select 'Continue'



Understanding Workflow

Help for this Page

Many of the tasks you normally assign, the emails you regularly send, and other record updates are part of your organization's standard processes. Instead of doing this work manually, you can configure workflow to do it automatically.

What is Workflow?

Workflow automates the following types of actions based on your organization's processes:

- Tasks—Assign a new task to a user, role, or record owner.
- Email Alerts—Send an email to one or more recipients you specify.
- Field Updates—Update the value of a field on a record.
- Outbound Messages—Send a secure, configurable API message (in XML format) to a designated listener.

For example, workflow can:

- Assign follow-up tasks to a support rep one week after a case is updated.
- Send sales management an email alert when a sales rep qualifies a large deal.
- Change the Owner field on a contract three days before it expires.
- Trigger an outbound API message to an external HR system to initiate the reimbursement process for an approved expense report.

Each workflow rule consists of:

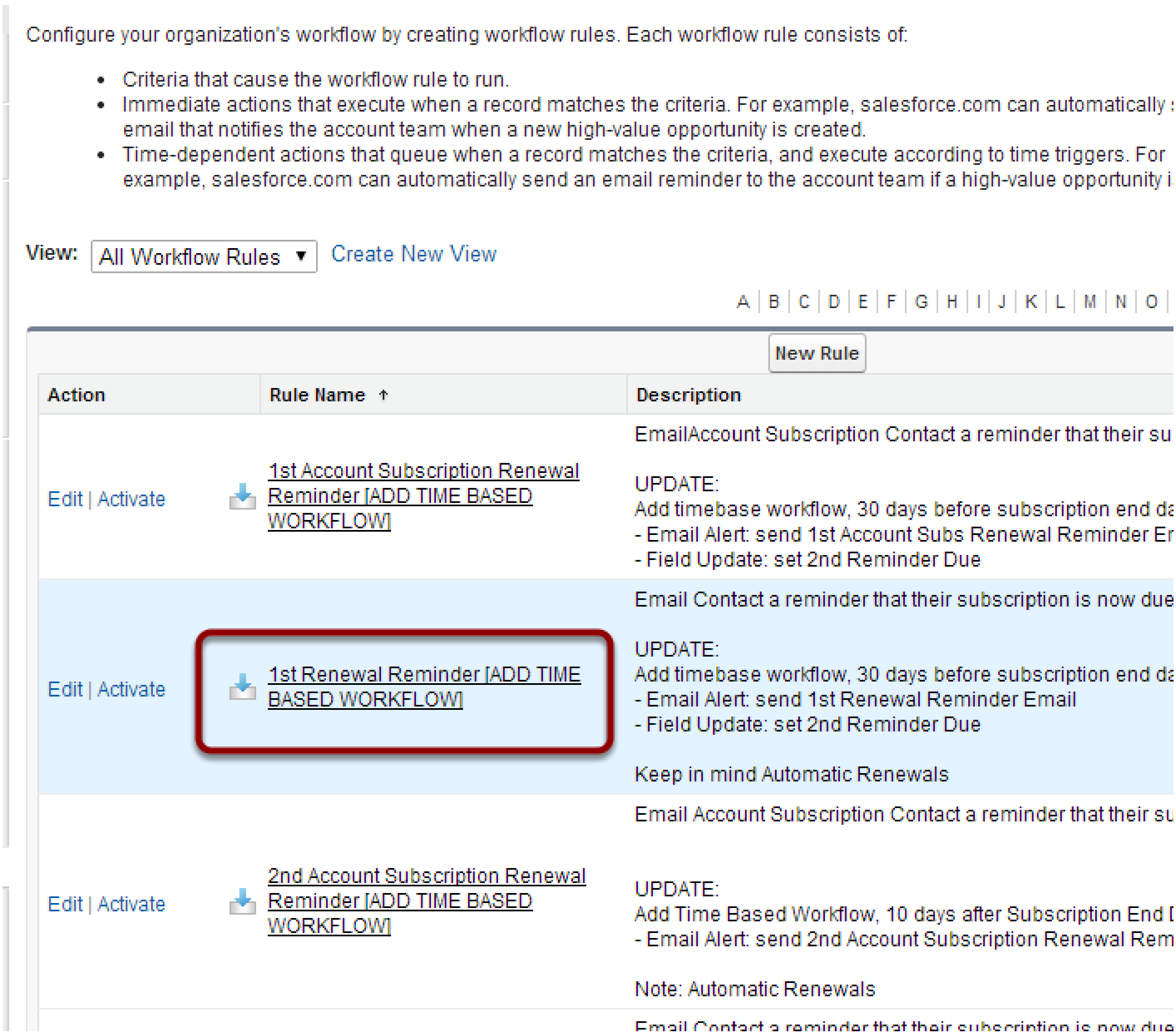
- Criteria that cause the workflow rule to run.
- Immediate actions that execute when a record matches the criteria. For example, salesforce.com can automatically send an email that notifies the account team when a new high-value opportunity is created.
- Time-dependent actions that queue when a record matches the criteria, and execute according to time triggers. For example, salesforce.com can automatically send an email reminder to the account team if a high-value opportunity is still open ten days before the close date.

Don't show me this page again

Continue

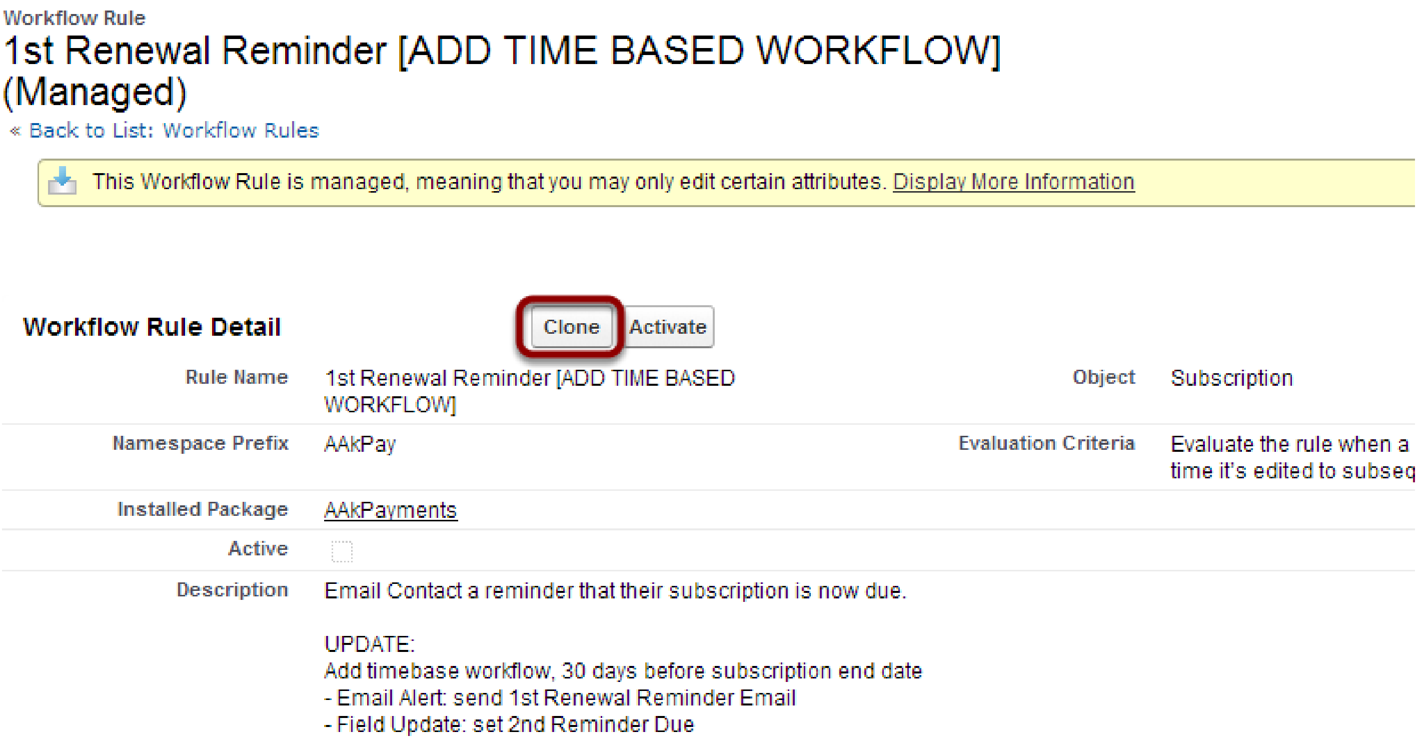
This page can be turned off.

3. Select '1st Renewal Reminder [ADD TIME BASED WORKFLOW]'

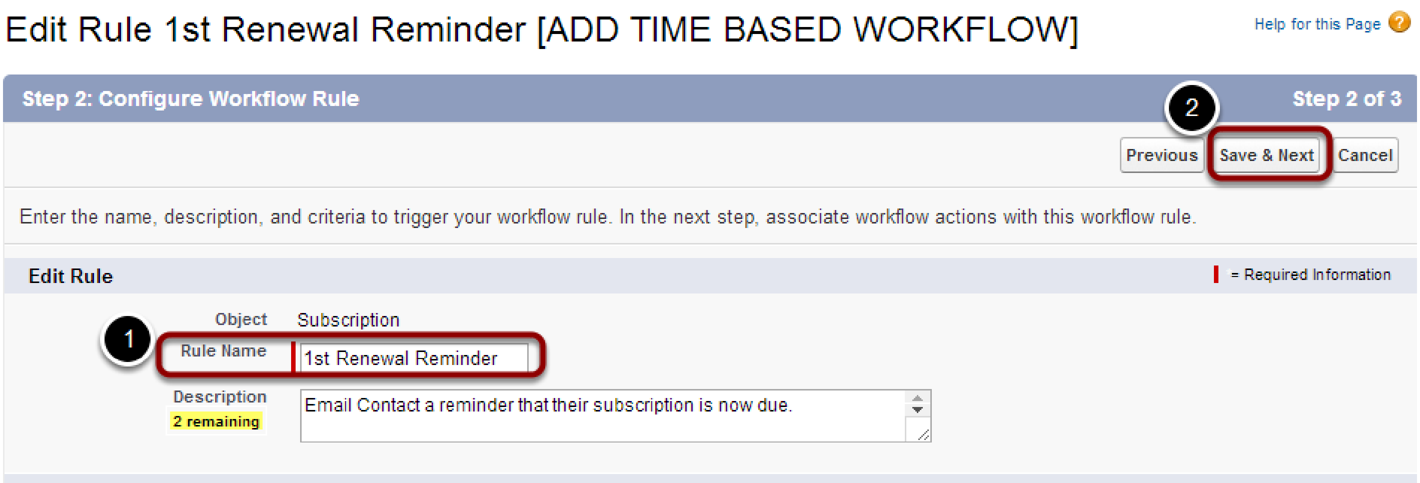


Open the circled rule

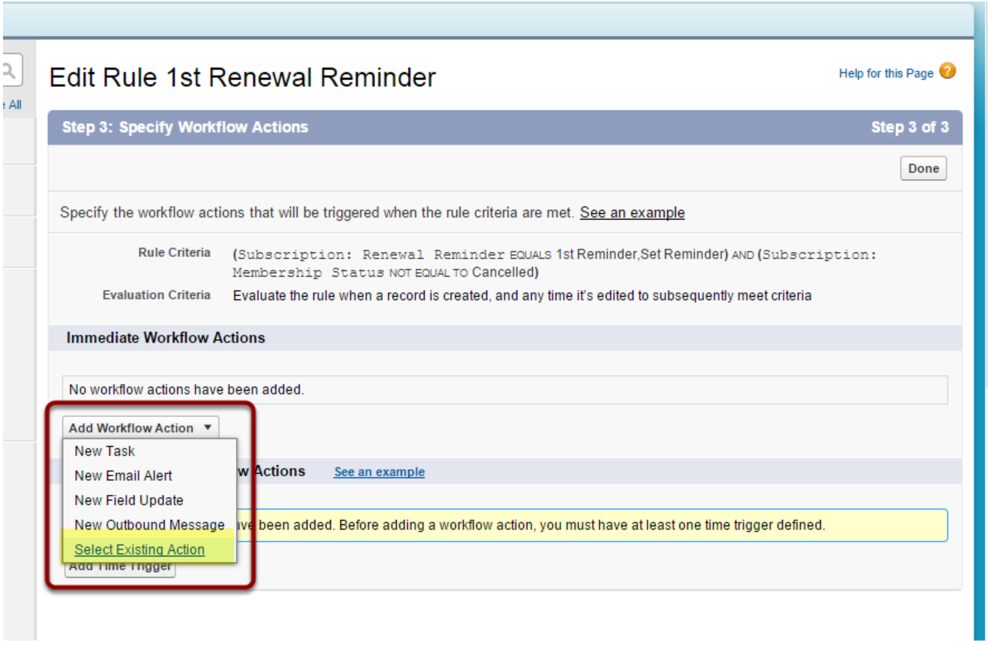
4. Select 'Clone'



4.1 Re-name the workflow rule '1st Renewal Reminder' and select 'Save & Next'

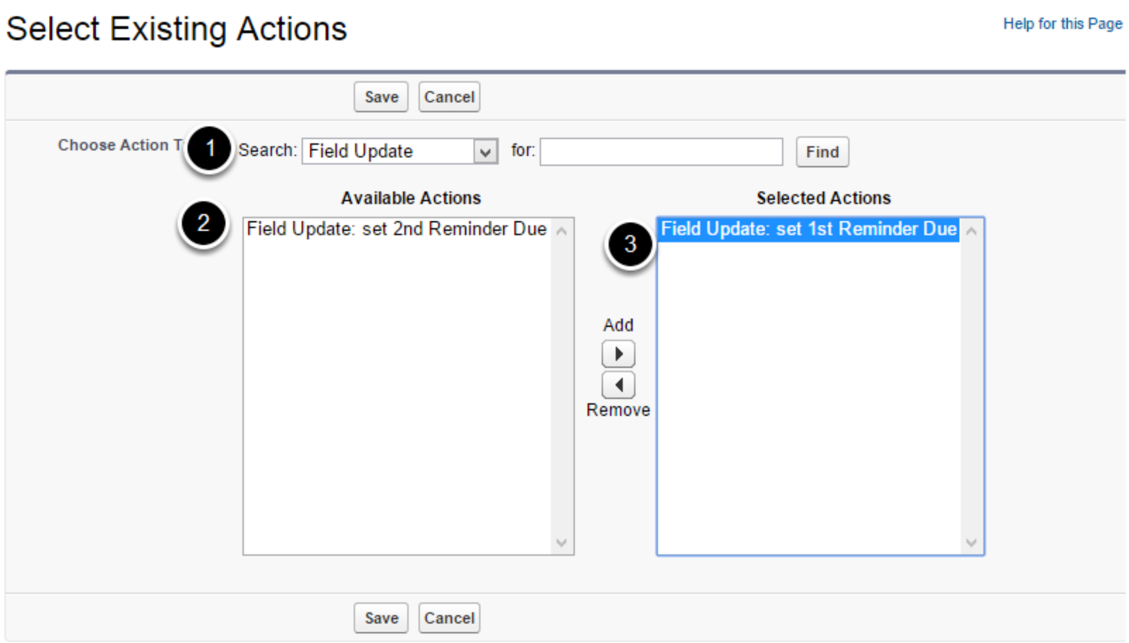


5. Select the 'Add Workflow Action'



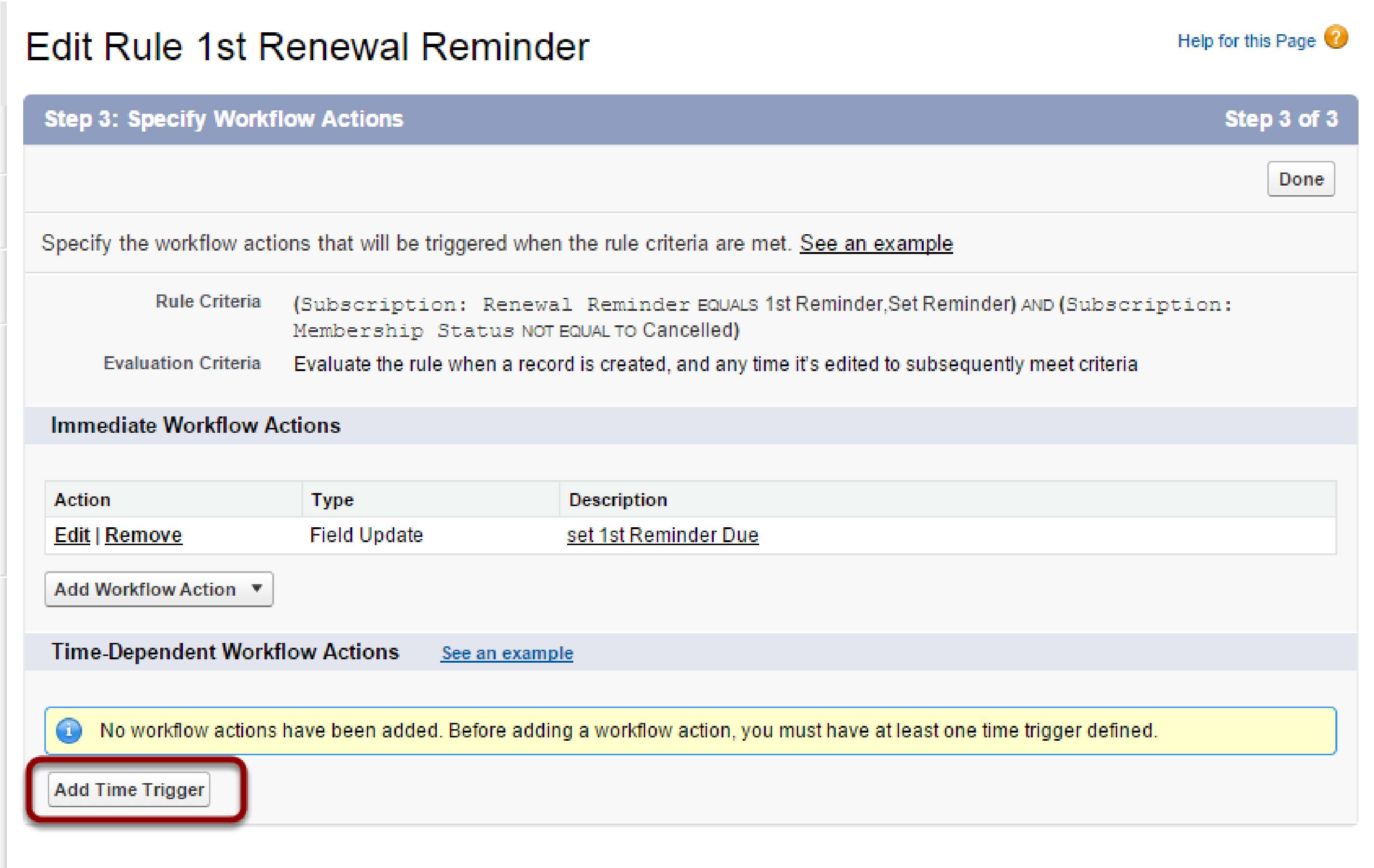
Select Add Workflow Action under the "Immediate Workflow Actions" Sections. Then 'Select Existing Action'.

5.1 Add existing field update - Set First Reminder Due

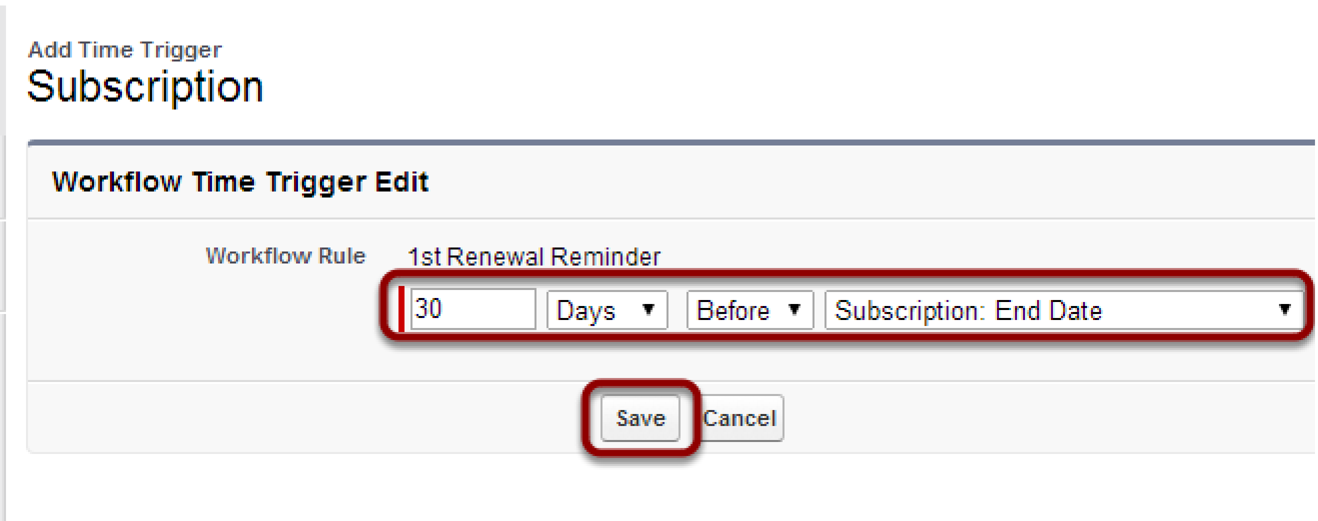


Then select Field Update from the Action Type and move "Set First Reminder" to the 'Selected Actions' and Save.

6. Select the 'Add Time Trigger' button

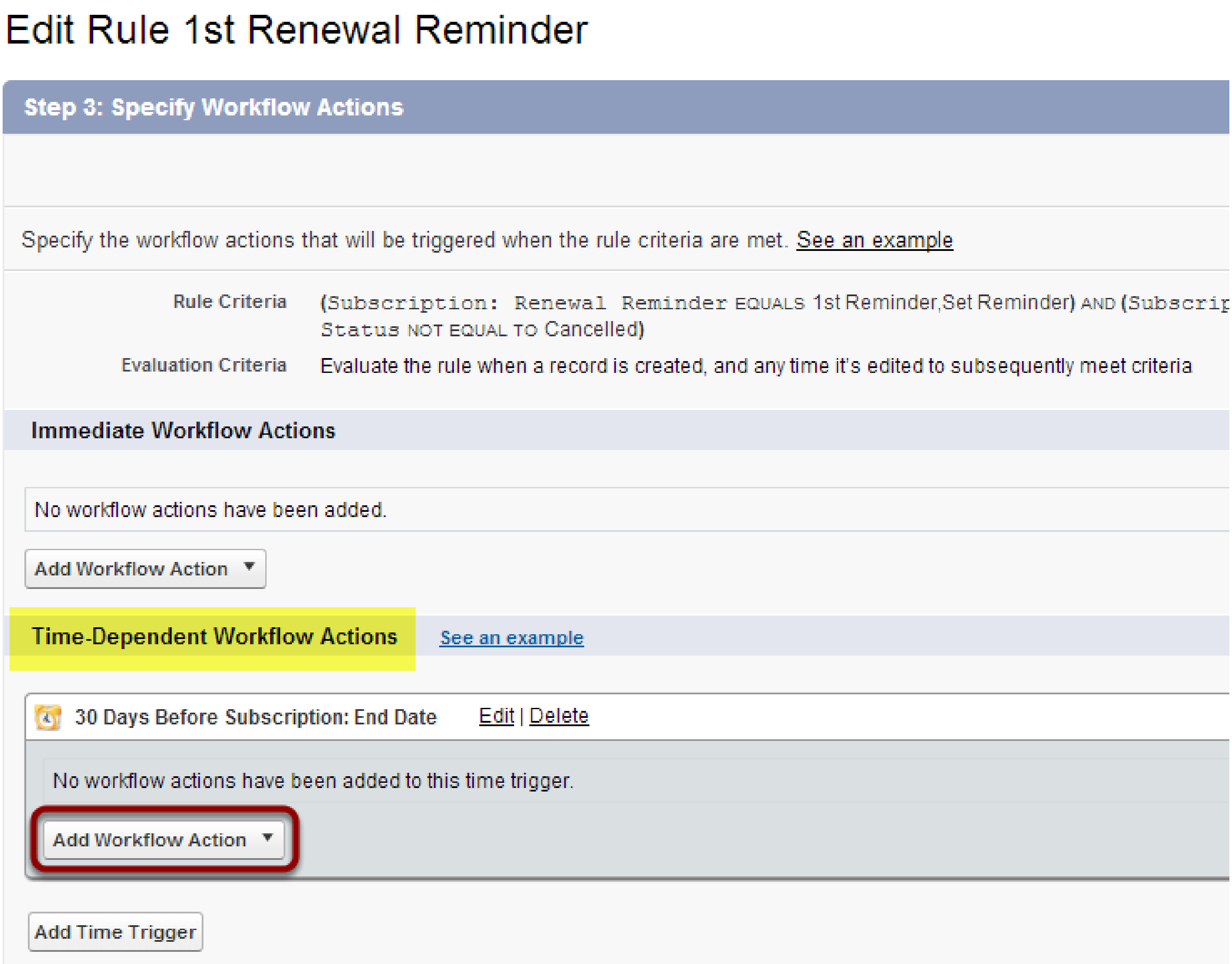


6.1 Set Time Trigger to '30 days before Subscription End Date' and Save

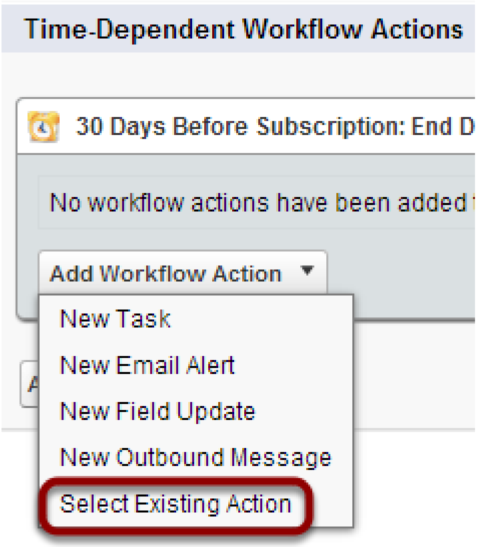


Note: You can change the number of days as required if you wish to give more/less notice.

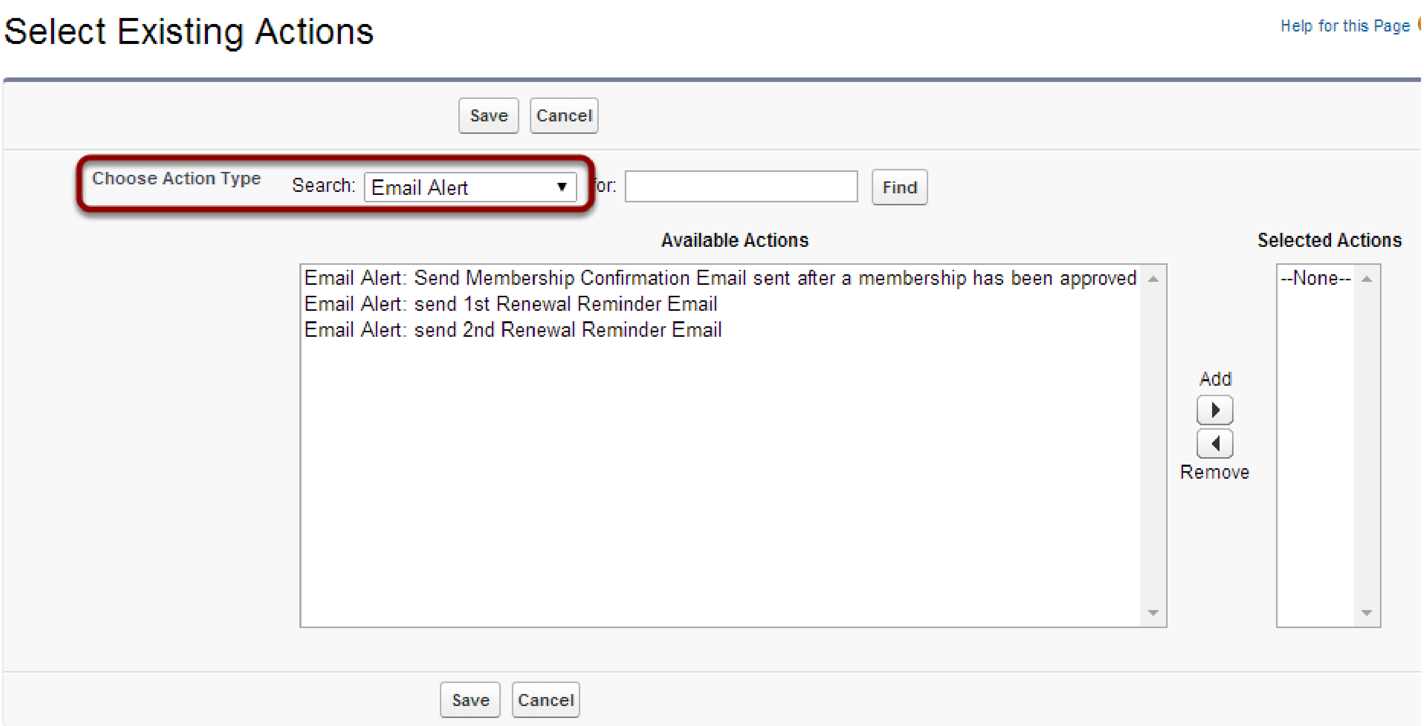
7. Select the 'Add Workflow Action' button in the Time Dependent Workflow Action section.



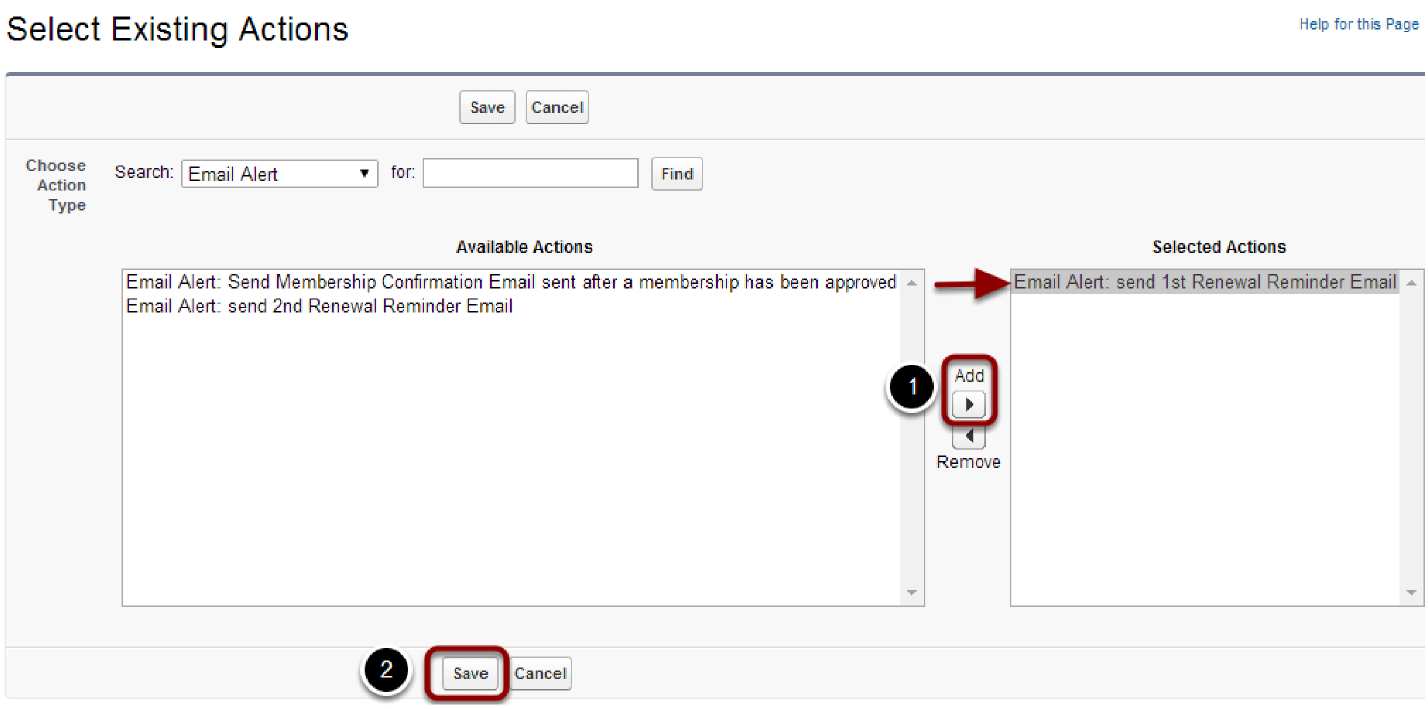
7.1 Select 'Select Existing Action from the drop down menu



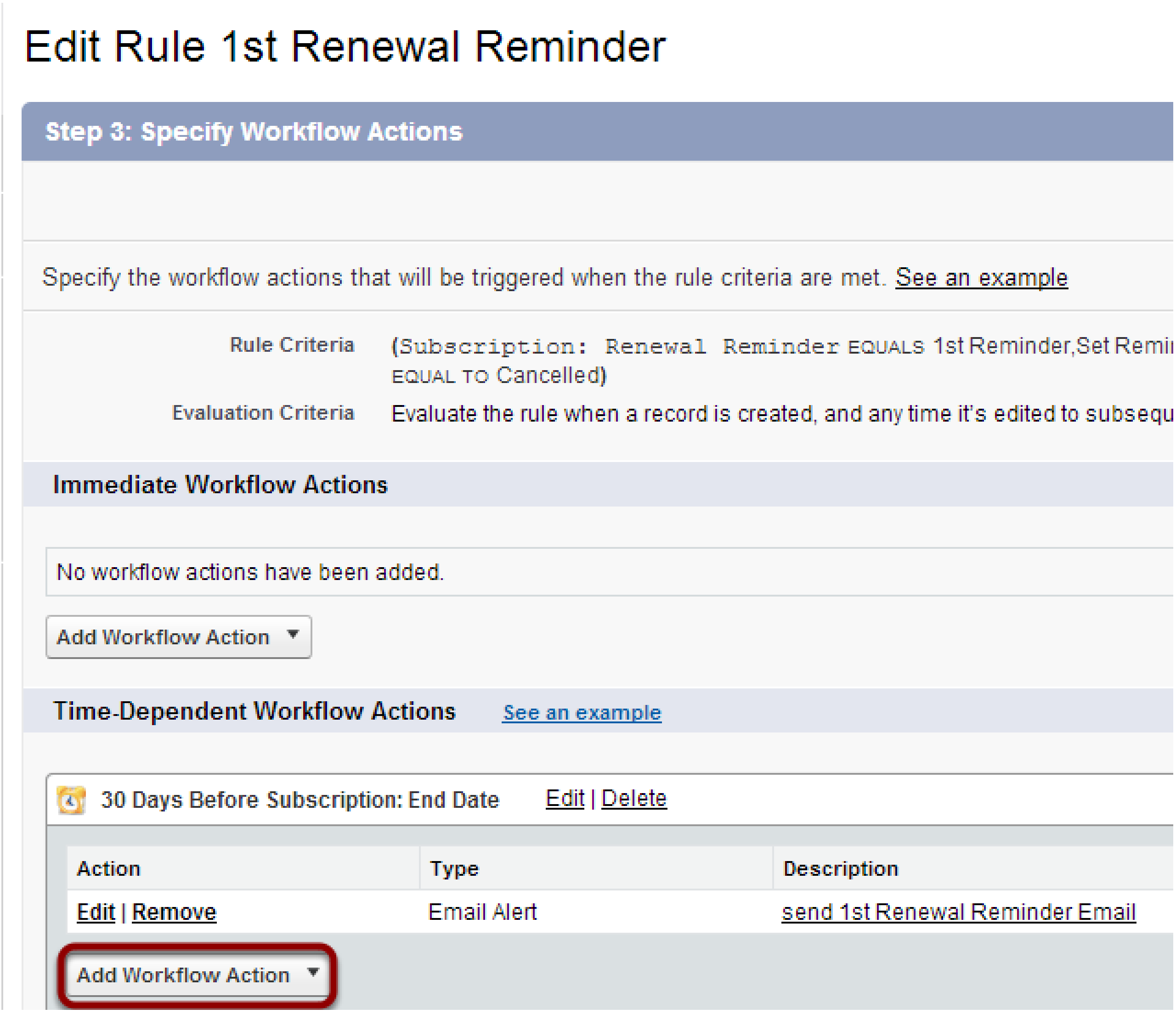
7.2 Select 'Email Alert' from the Choose Action Type drop down menu



7.3 Add 'Email Alert: send 1st Renewal Reminder Email' and Save

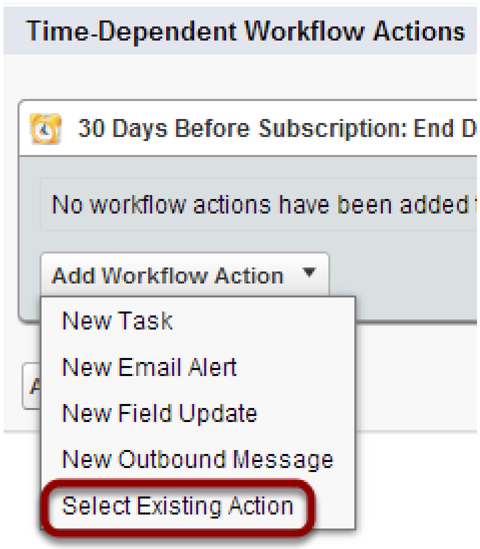


8. Select the 'Add Workflow Action' button in the Time Dependent Workflow Action section.

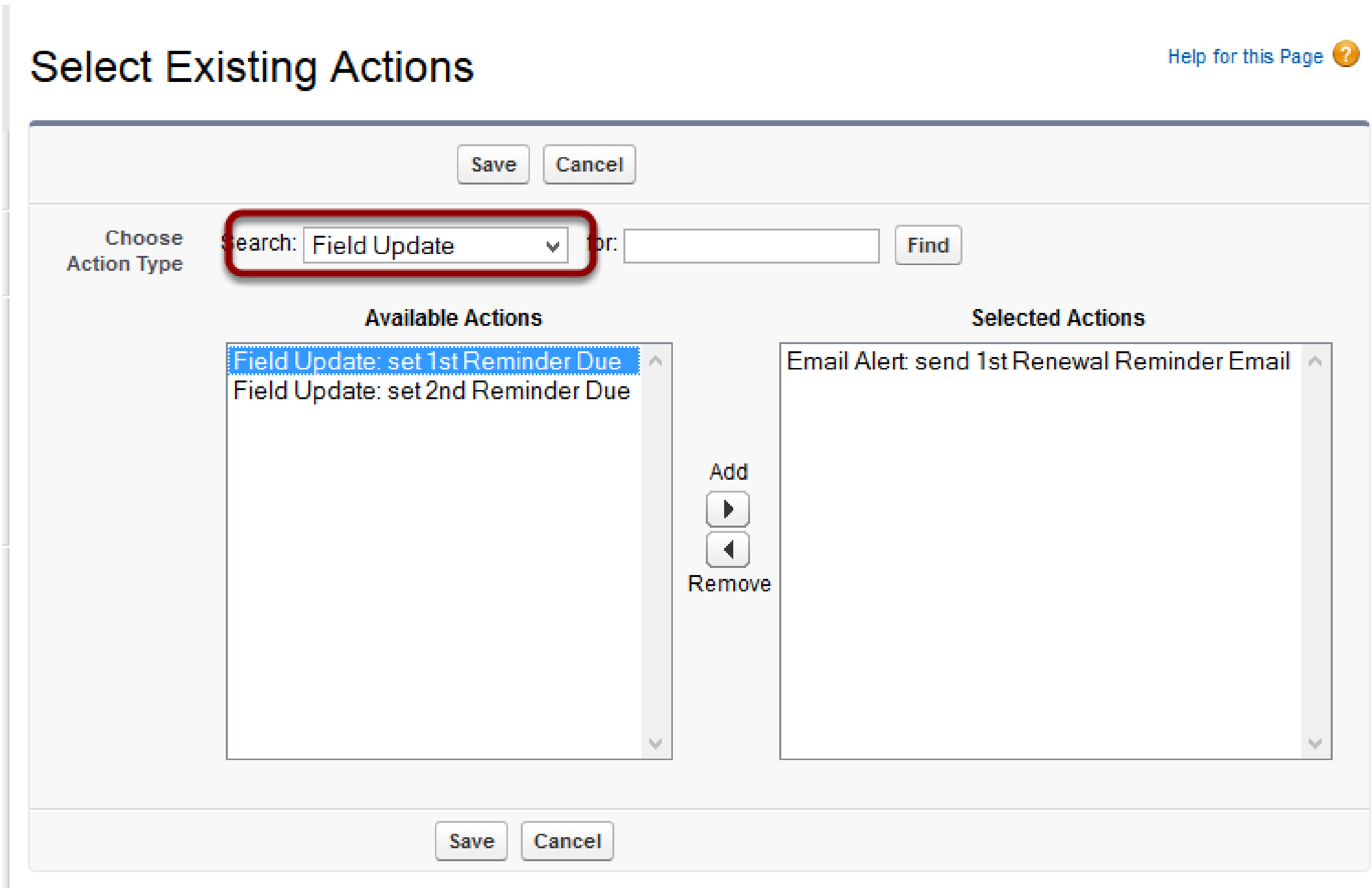


This Workflow Action is set as a trigger for the 2nd Reminder.

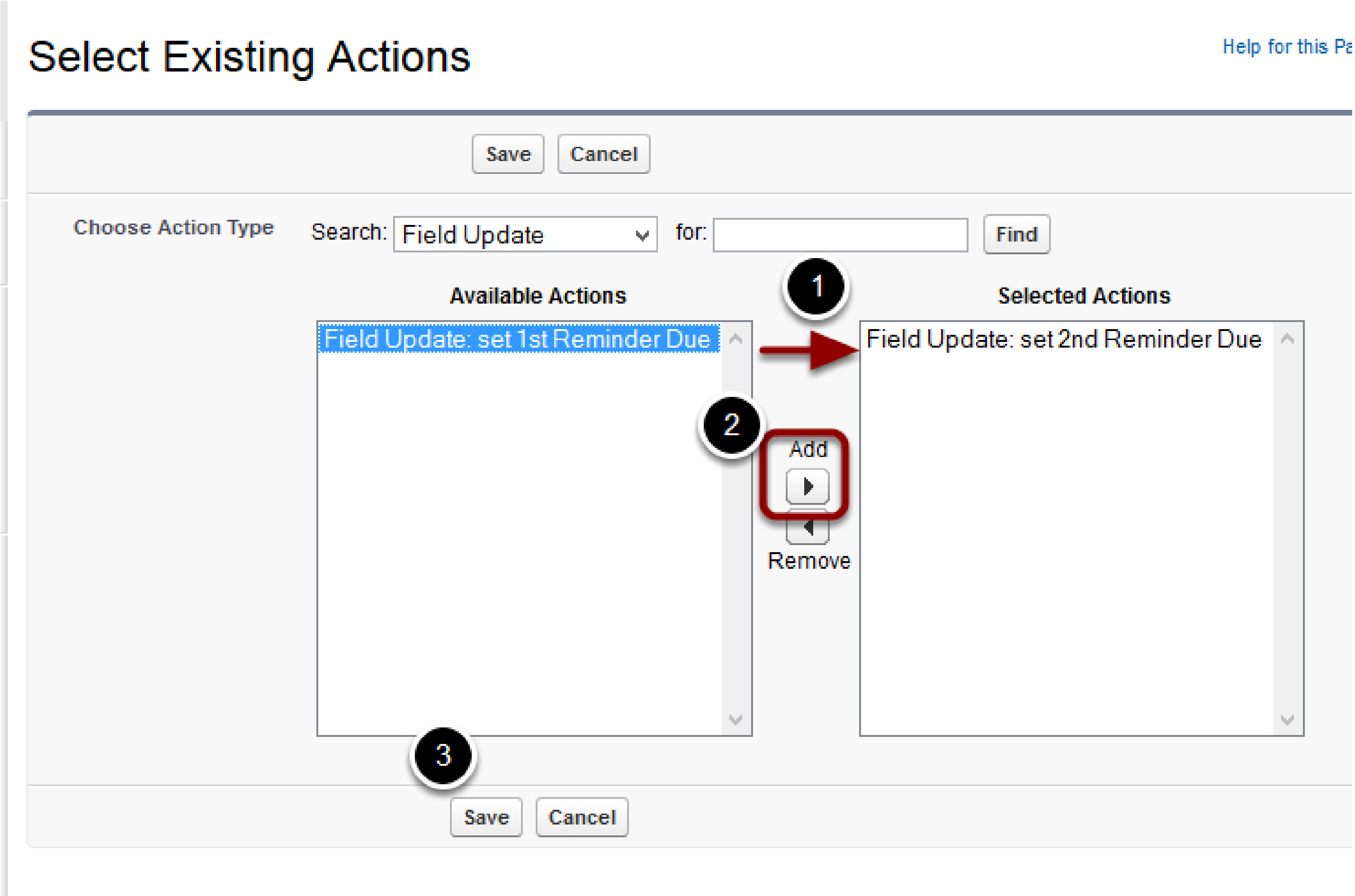
8.1 Select 'Select Existing Action' from the drop down menu



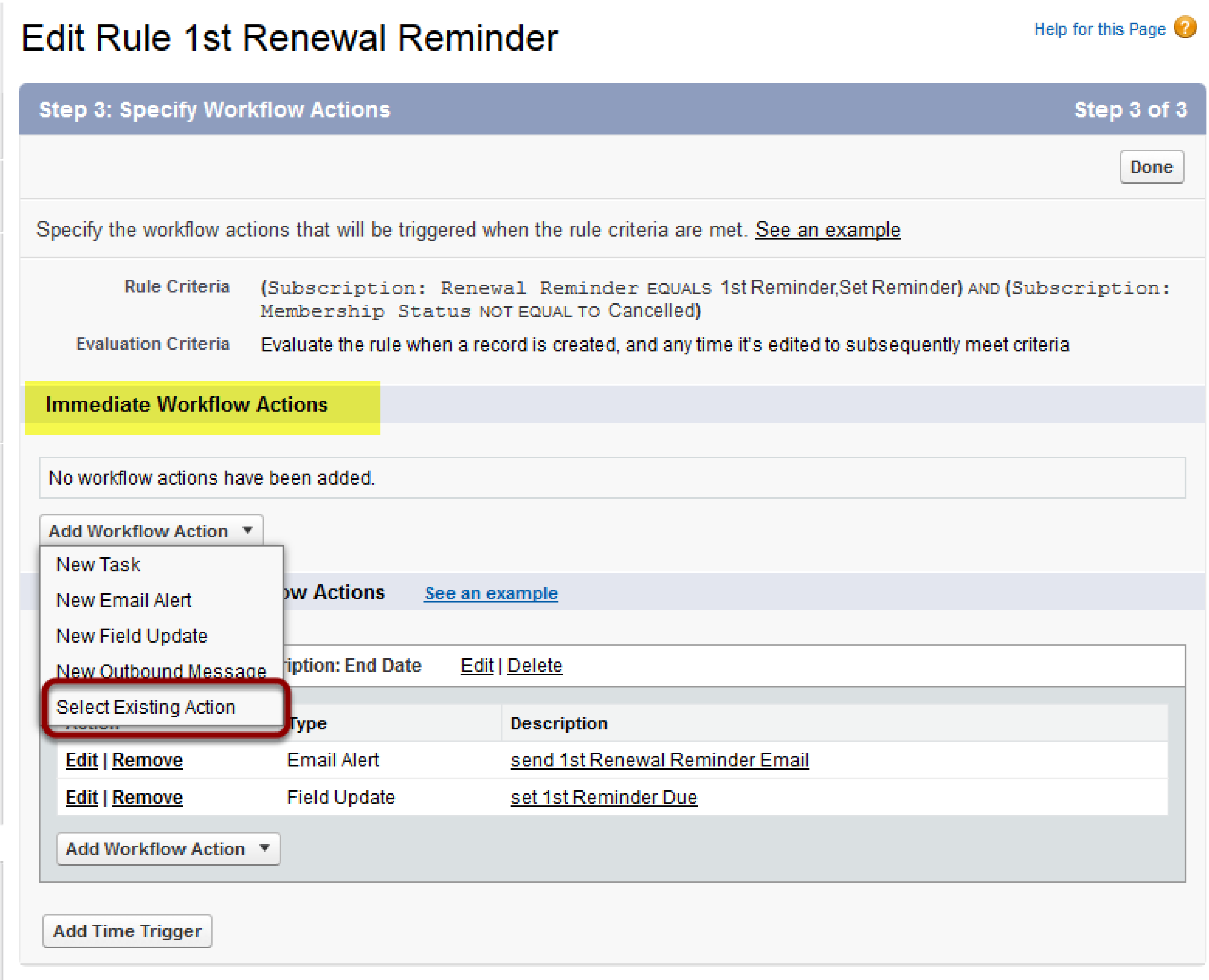
8.2 Select 'Field Update' from the Choose Action Type drop down menu



8.3 Select Field Update: Set 2nd Reminder Due

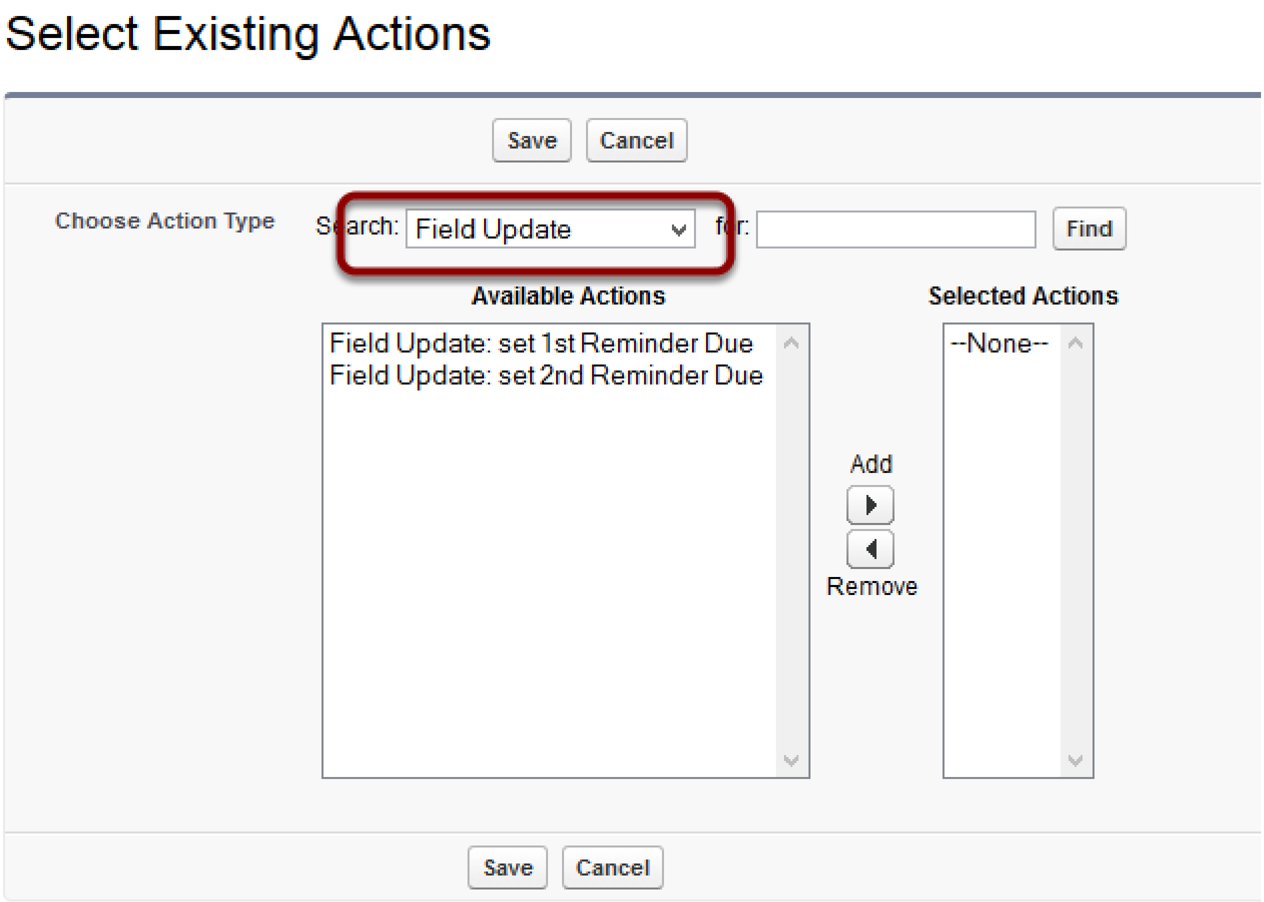


9. Select the 'Add Workflow Action' button in the Immediate Workflow Actions section.

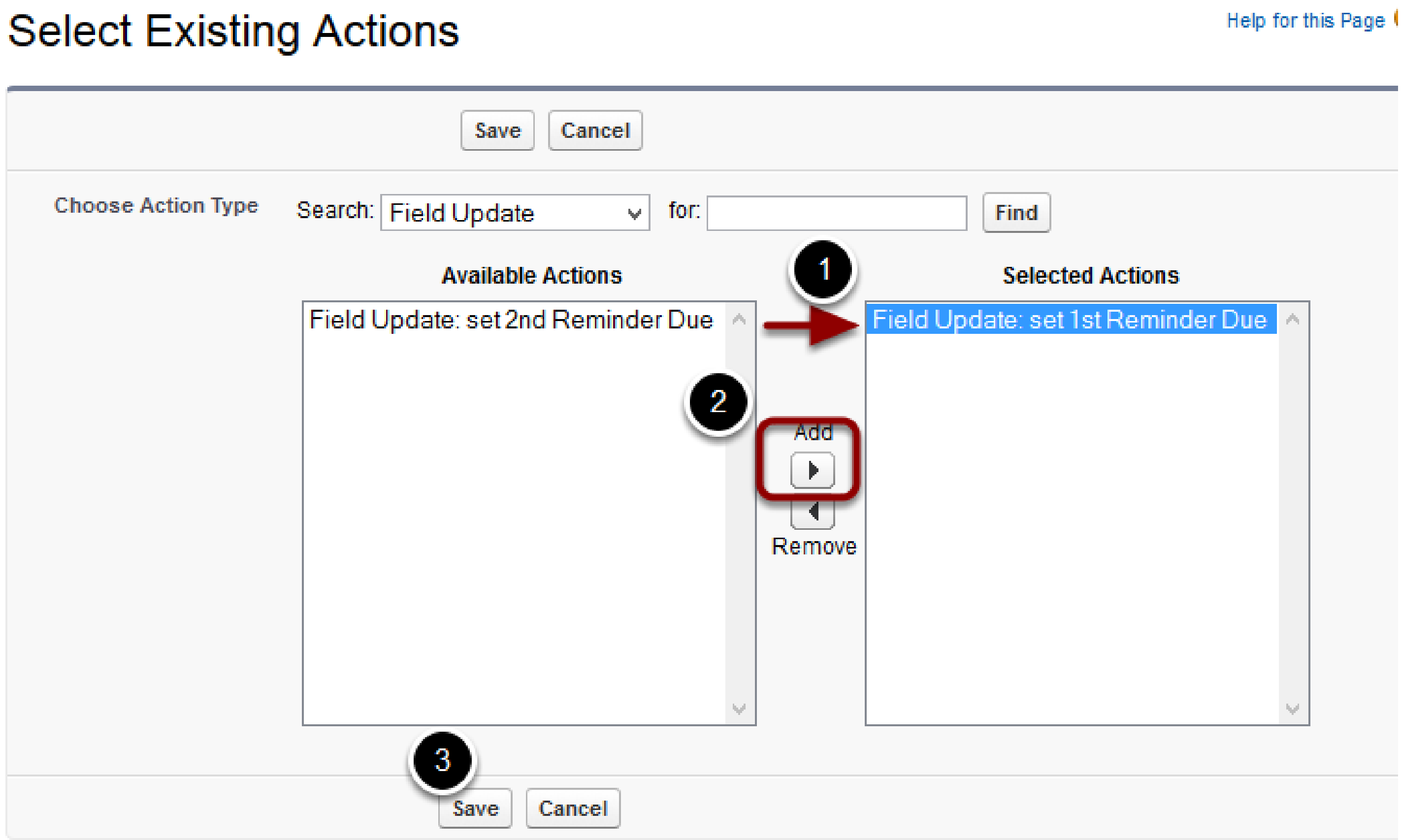


Make sure you are NOT adding a time based workflow, but an immediate one

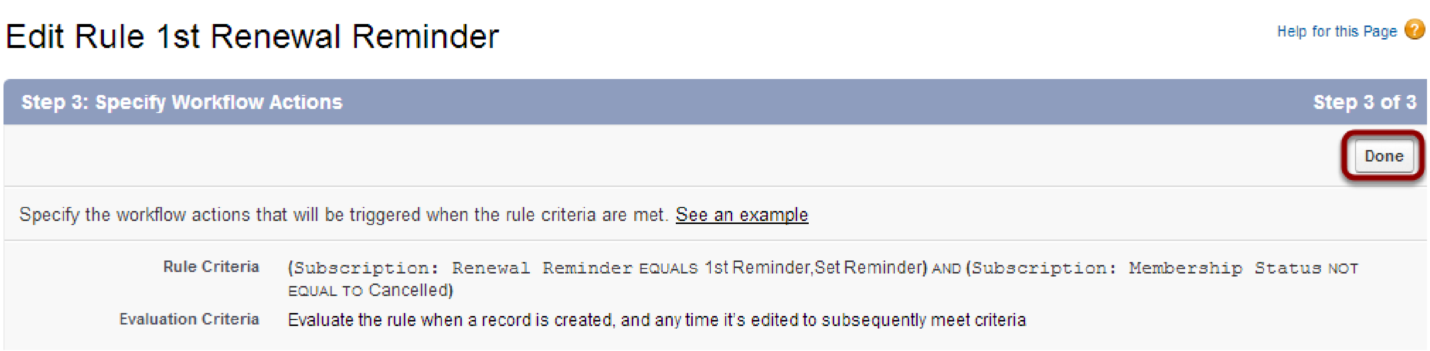
9.1 Select Field Update



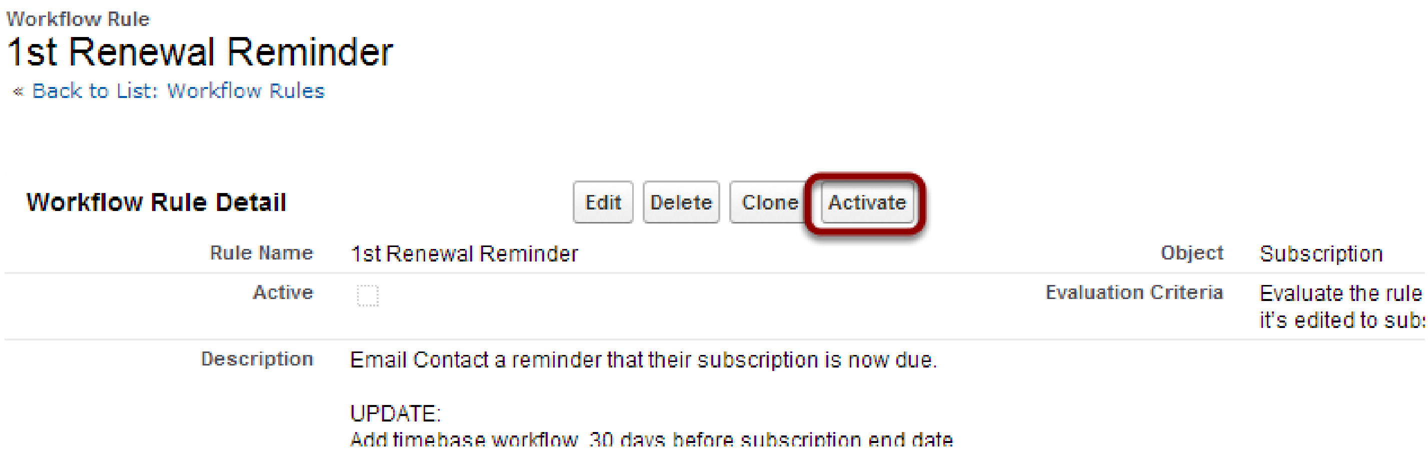
9.2 Select Field Update: Set 1st Reminder Due



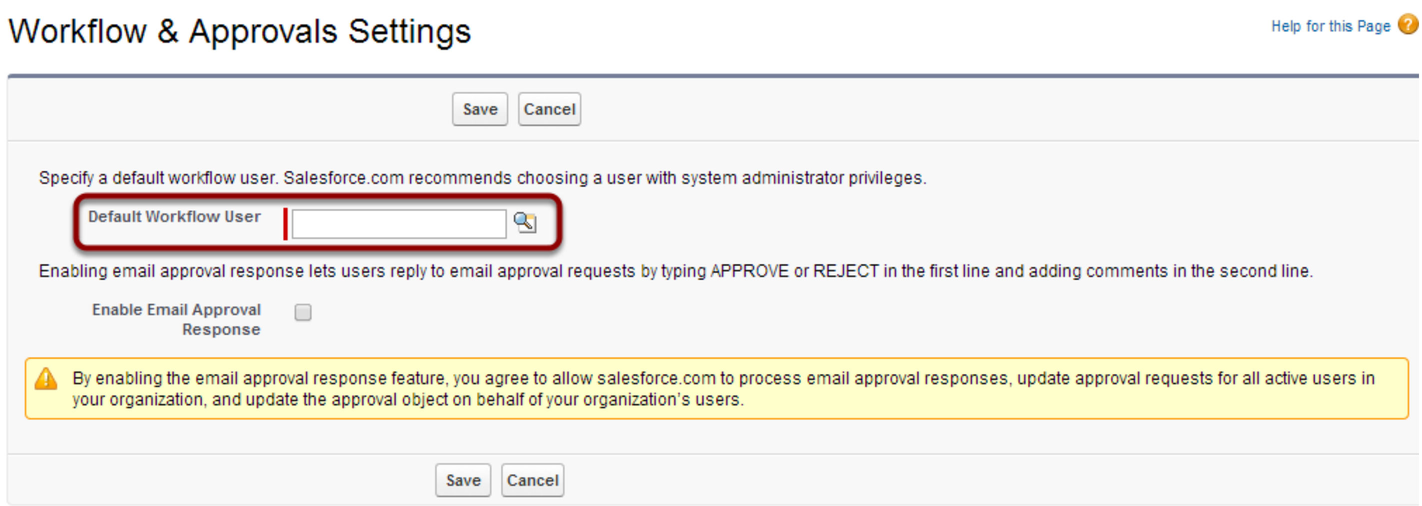
10. Select 'Done' button to complete the workflow rule



10.1 Select 'Activate' to begin the workflow process

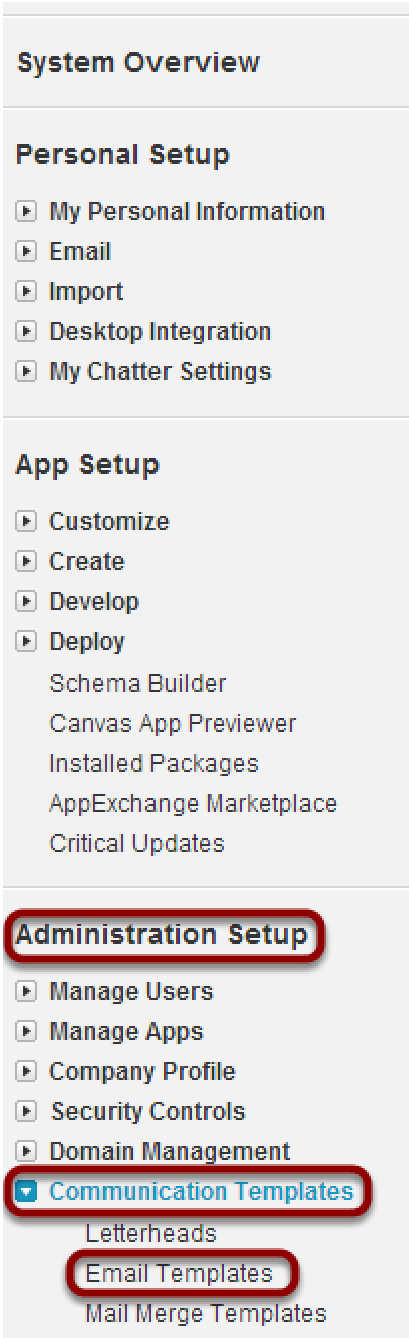


10.2 Set 'Default Workflow User' and Save

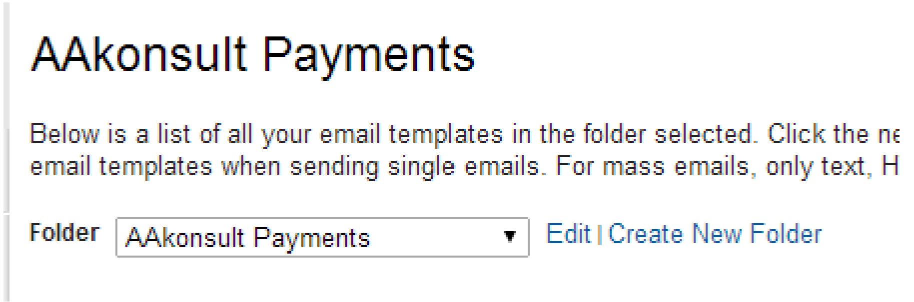


If a Default Workflow User has already been set, this step will be skipped.

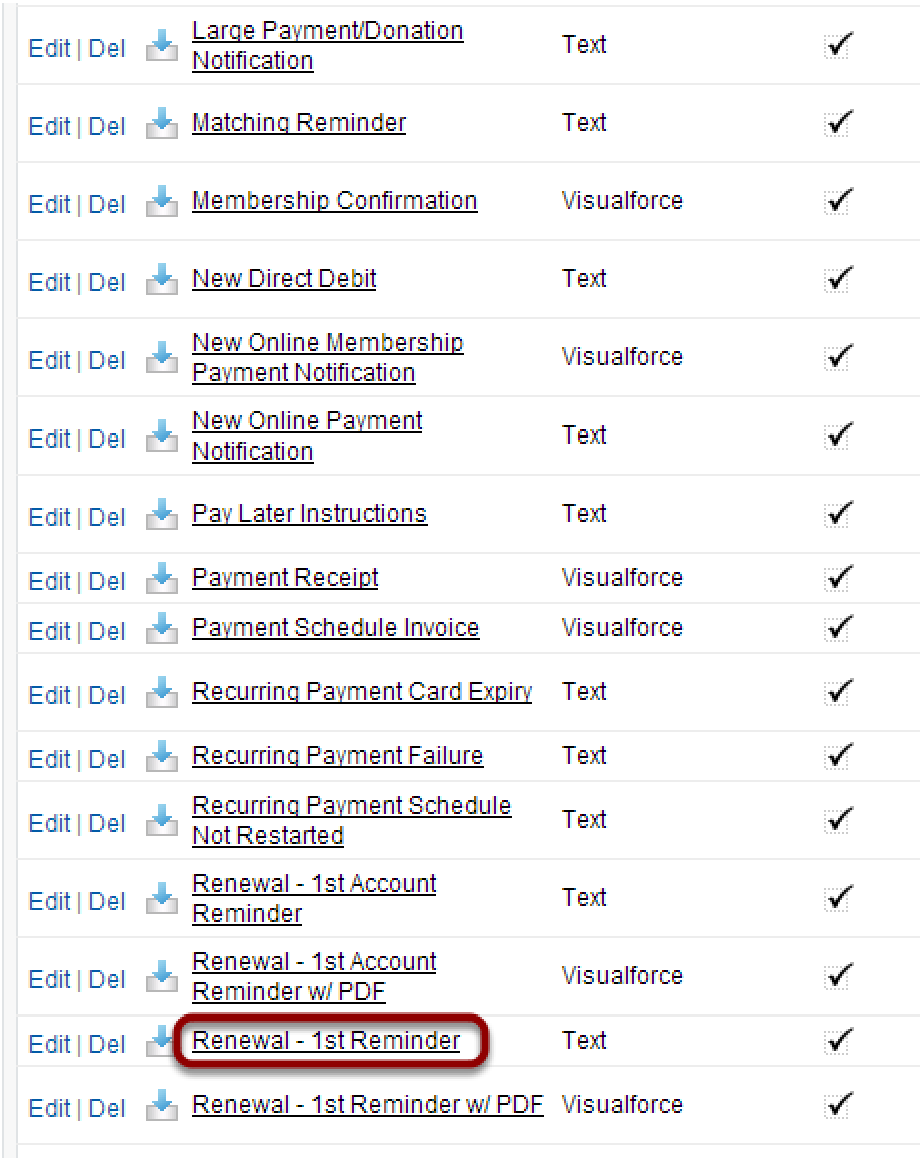
11. Review email template for 1st Reminder [Setup > Administration Setup> Communication Templates > Email Templates]



11.1 Select AAkonsult Payments from the drop down Folder list



11.2 Scroll down to find 'Renewal - 1st Reminder'



11.3 Edit and test your template

Text Email Template

Renewal - 1st Reminder (Managed)

« Back to List: Workflow Rules

Preview your email template below.

This Email Template is managed, meaning that you may only edit certain attributes. Display More Information

Email Template Detail Edit Delete Clone

Folder	AAkonsult Payments		
Email Template Name	Renewal - 1st Reminder	Available For Use	✓
Template Unique Name	Renewal_1st_Reminder	Last Used Date	
Namespace Prefix	AAkPay	Times Used	
Installed Package	AAkPayments		
Encoding	General US & Western Europe (ISO-8859-1, ISO-LATIN-1)		
Author	Jeff Challis [Change]		
Description	Renewal - 1st Reminder, sent automatically by workflow		
Created By	Jeff Challis, 3/10/2013 6:00 PM	Modified By	Jeff (

Edit Delete Clone

Email Template Send Test and Verify Merge Fields

Subject Membership Renewal

Plain Text Preview

Dear {!NullValue(Contact.FirstName,"Supporter")},

Your membership is due to expire on the {!AAkPay__Subscription__c.AAkPay__End_Date__c}.

Renewing your membership is easy, simply follow the following link:
{!AAkPay__Subscription__c.AAkPay__Renewal_URL__c}

Regards
The team at {!Organization.Name}

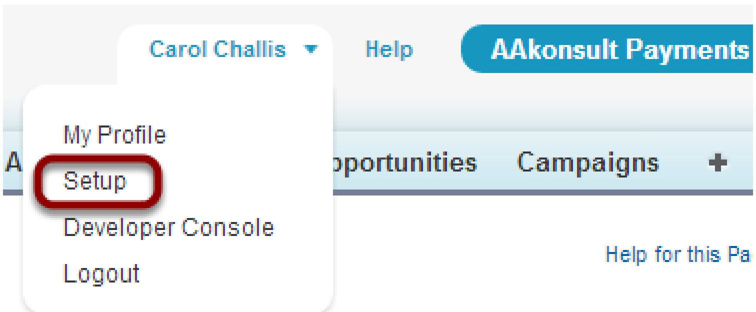
How to send out second automated reminders - contact level

This workflow setup is required only if you wish to send out a second automated reminder to members/subscribers.

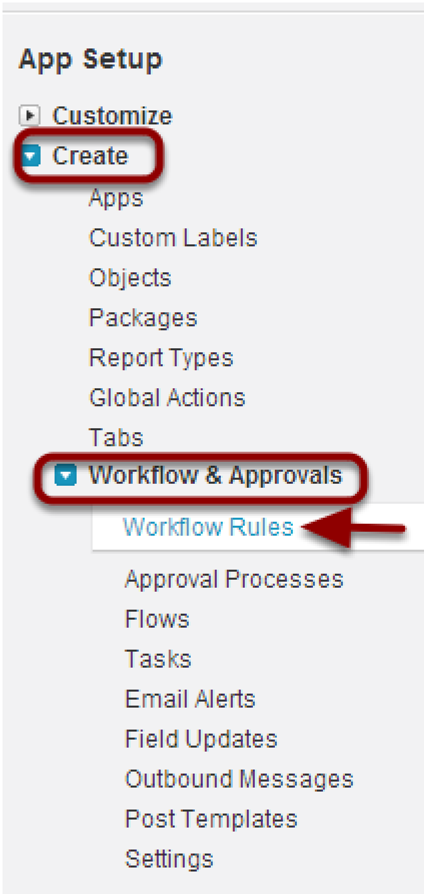
Quick Steps:

1. Clone Workflow rule "2nd Renewal Reminder [ADD TIME BASED WORKFLOW]" and rename to "2nd Renewal Reminder"
2. Add a Time-Dependant Action. Set it to fire 10 days after subscription end date (or time period you would like).
   Add Action - use existing workflow - "send 2nd Renewal Reminder Email"
3. Optionally, update the Email and/or PDF templates

Navigate to Setup > App Setup > Create > Workflow & Approvals > Workflow Rules



Select 'Workflow Rules'



Read about Workflows and select 'Continue'

Understanding Workflow

Help for this Page

Many of the tasks you normally assign, the emails you regularly send, and other record updates are part of your organization's standard processes. Instead of doing this work manually, you can configure workflow to do it automatically.

What is Workflow?

Workflow automates the following types of actions based on your organization's processes:

- Tasks—Assign a new task to a user, role, or record owner.
- Email Alerts—Send an email to one or more recipients you specify.
- Field Updates—Update the value of a field on a record.
- Outbound Messages—Send a secure, configurable API message (in XML format) to a designated listener.

For example, workflow can:

- Assign follow-up tasks to a support rep one week after a case is updated.
- Send sales management an email alert when a sales rep qualifies a large deal.
- Change the Owner field on a contract three days before it expires.
- Trigger an outbound API message to an external HR system to initiate the reimbursement process for an approved expense report.

Each workflow rule consists of:

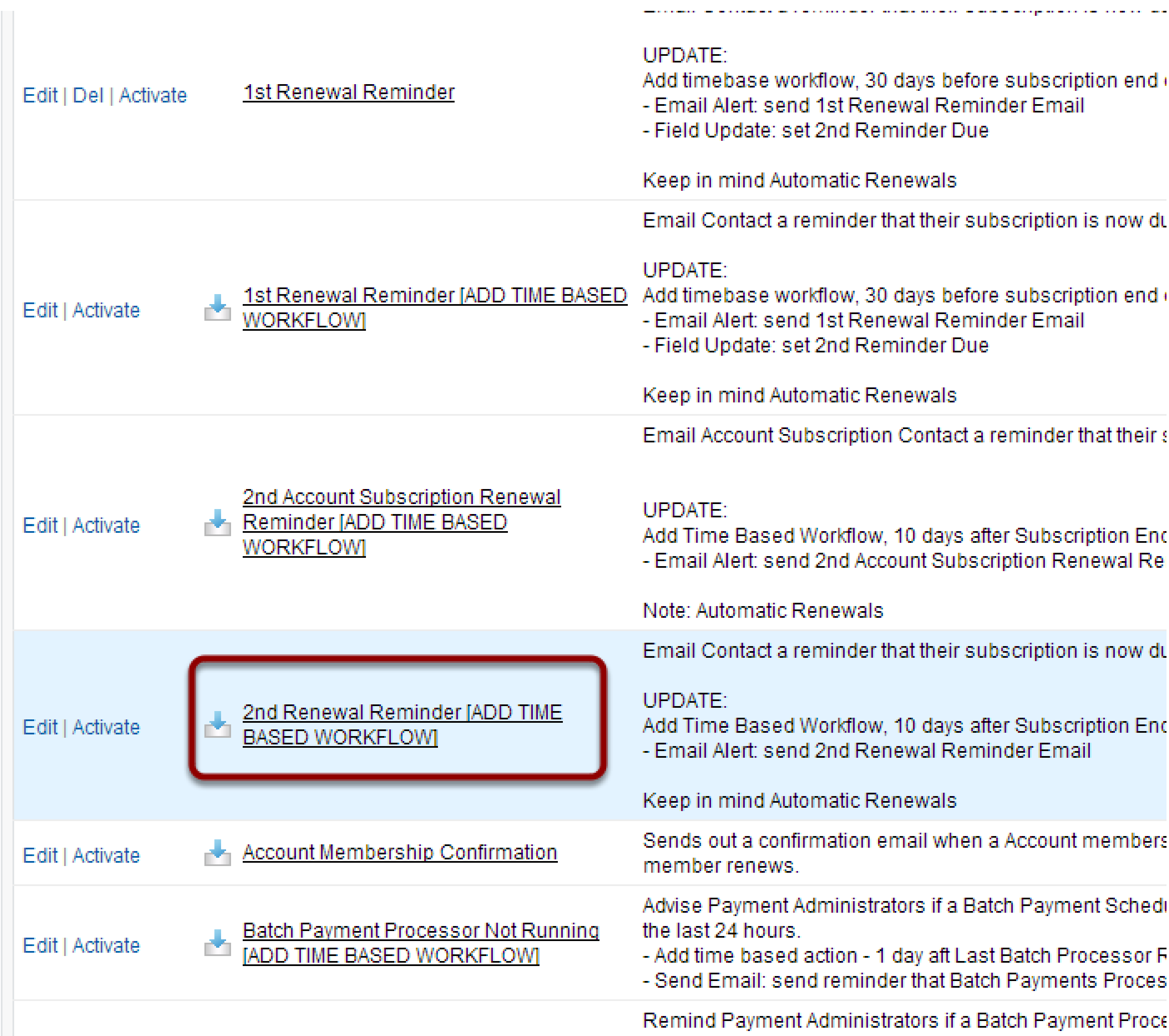
- Criteria that cause the workflow rule to run.
- Immediate actions that execute when a record matches the criteria. For example, salesforce.com can automatically send an email that notifies the account team when a new high-value opportunity is created.
- Time-dependent actions that queue when a record matches the criteria, and execute according to time triggers. For example, salesforce.com can automatically send an email reminder to the account team if a high-value opportunity is still open ten days before the close date.

Don't show me this page again

Continue

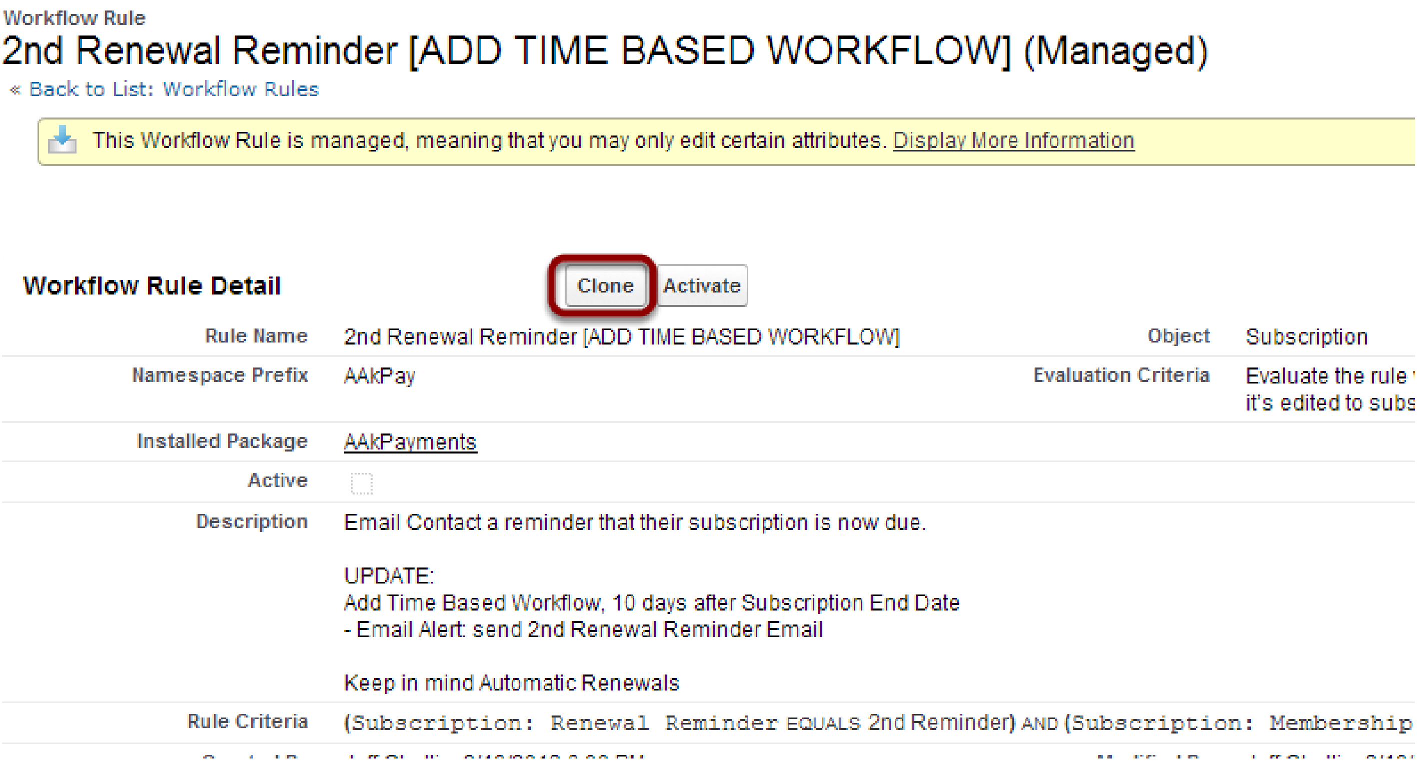
This page can be turned off.

Scroll down and select '2nd Renewal Reminder [ADD TIME BASED WORKFLOW]'

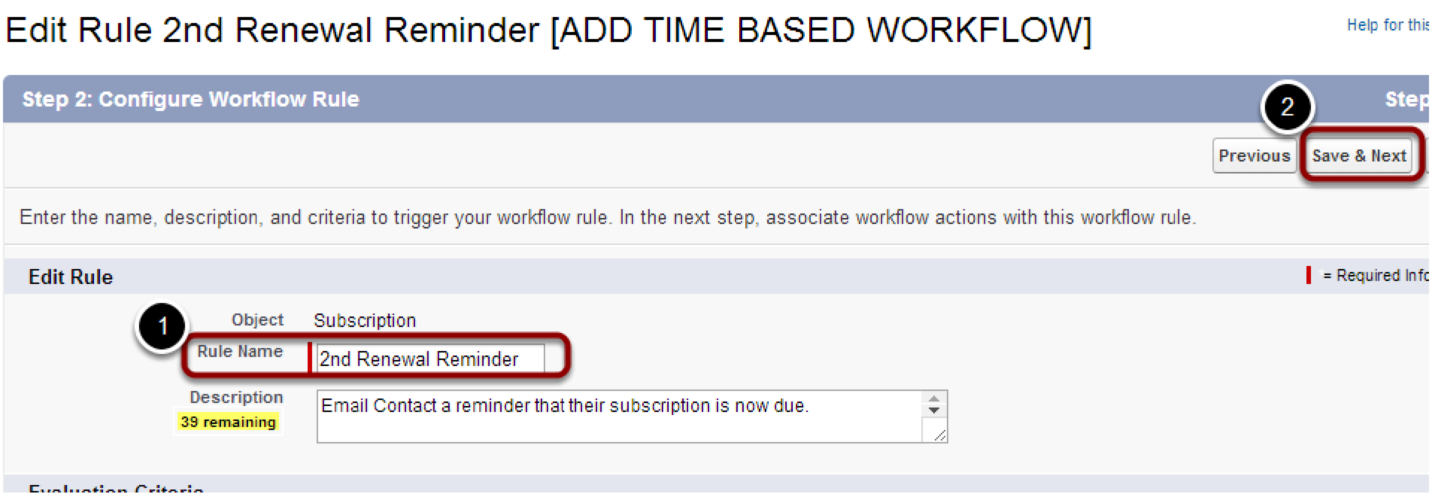


Open the circled rule

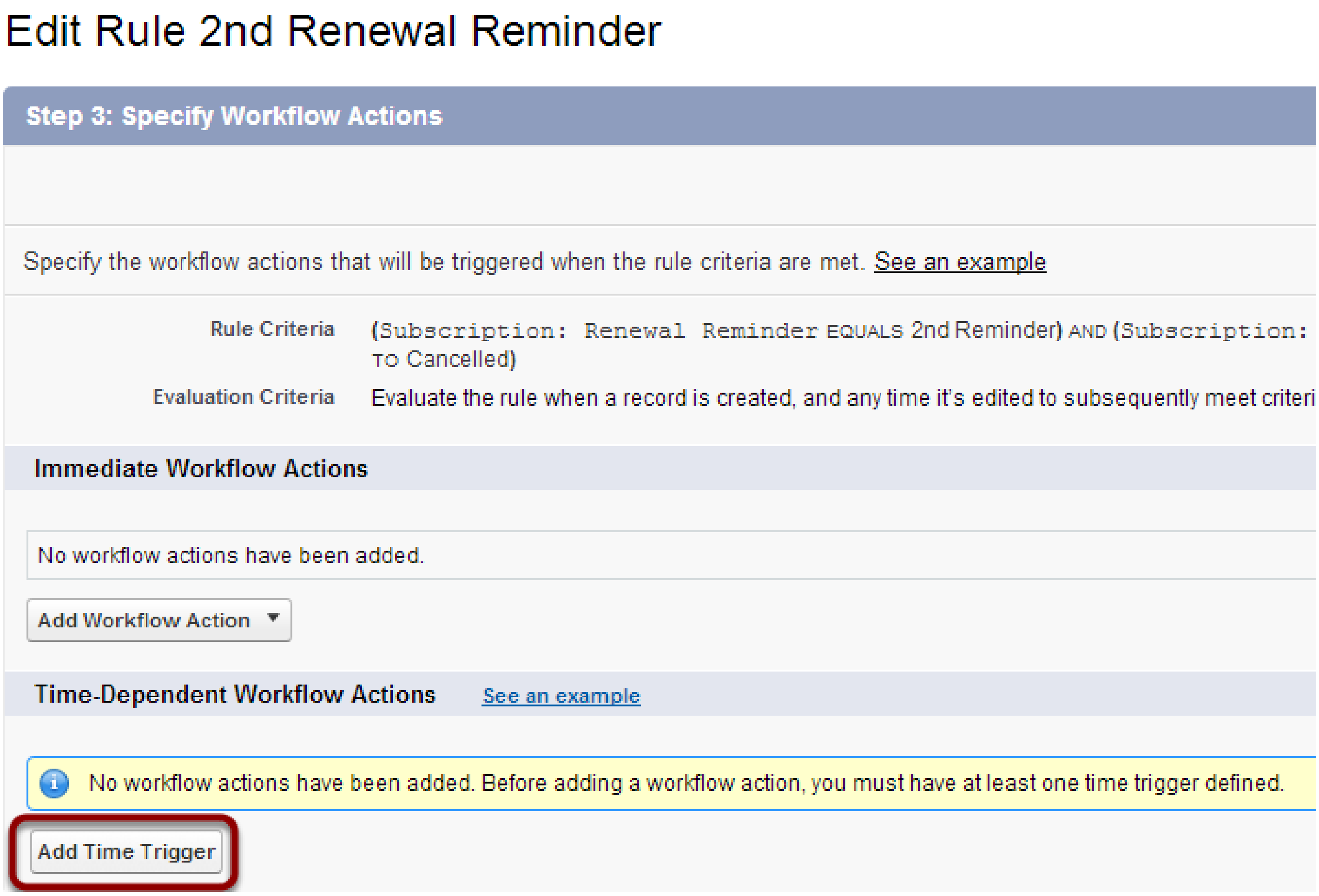
Select 'Clone'



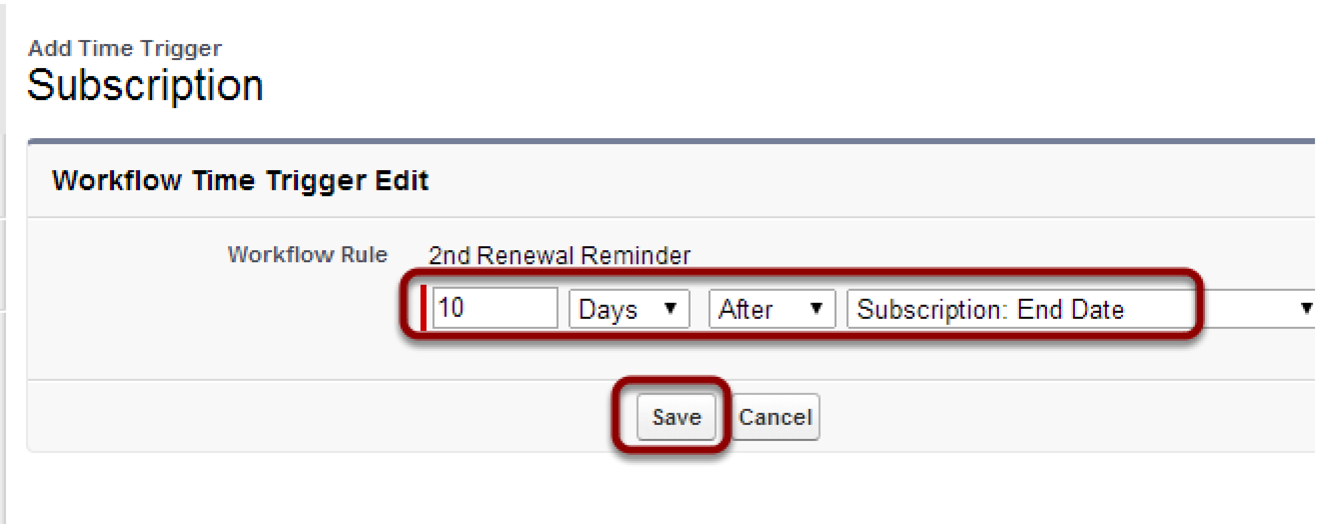
Re-name the workflow rule '2nd Renewal Reminder' and select 'Save & Next'



Select the 'Add Time Trigger' button

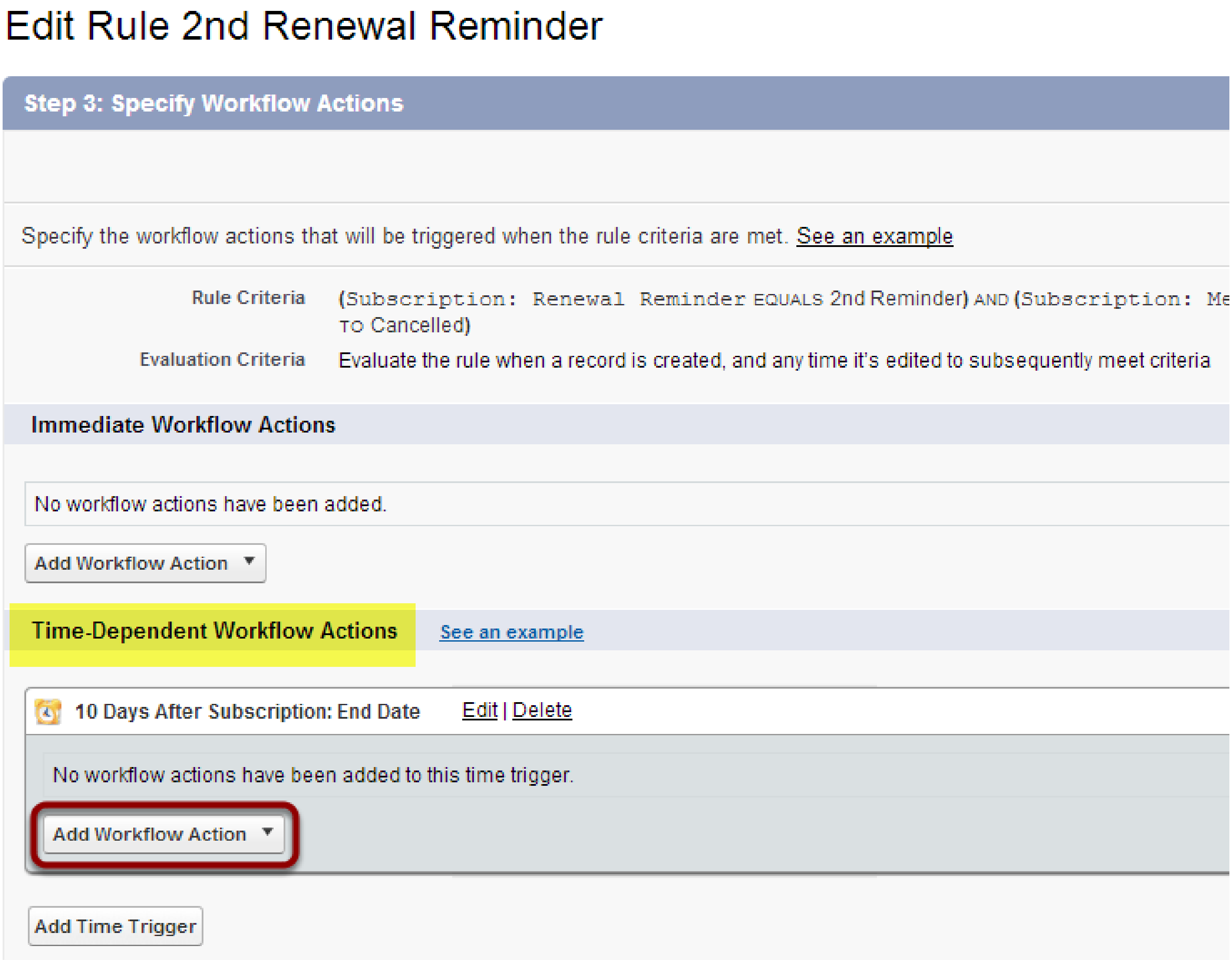


Set Time Trigger to '10 days after Subscription End Date' and Save

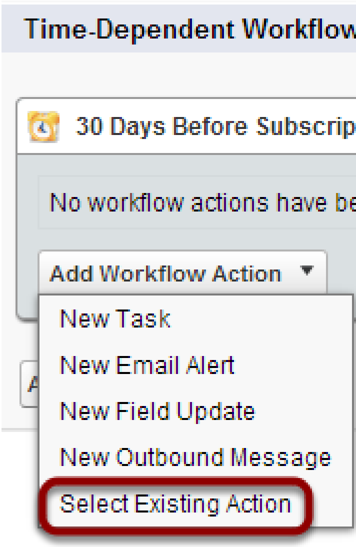


Note: You can change the number of days as required if you wish to give more/less notice.

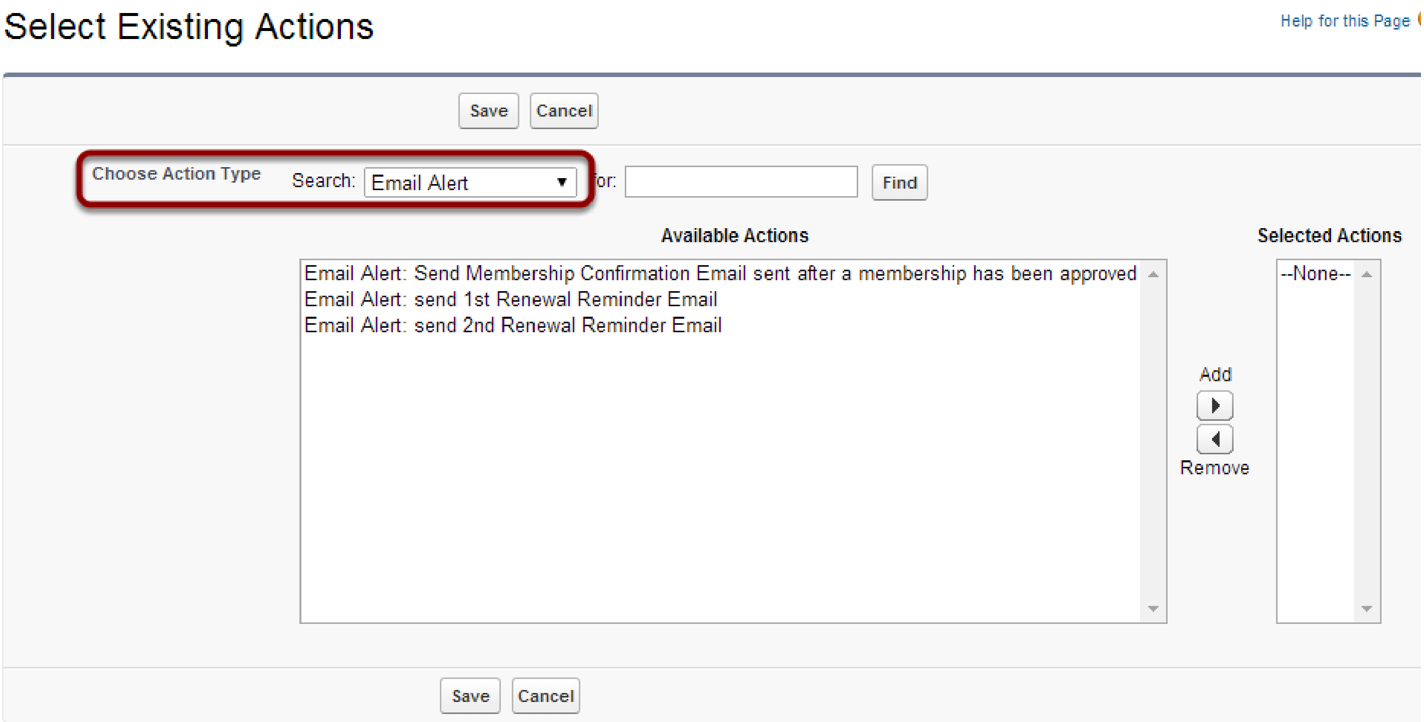
Select the 'Add Workflow Action' button in the Time Dependent Workflow Action section.



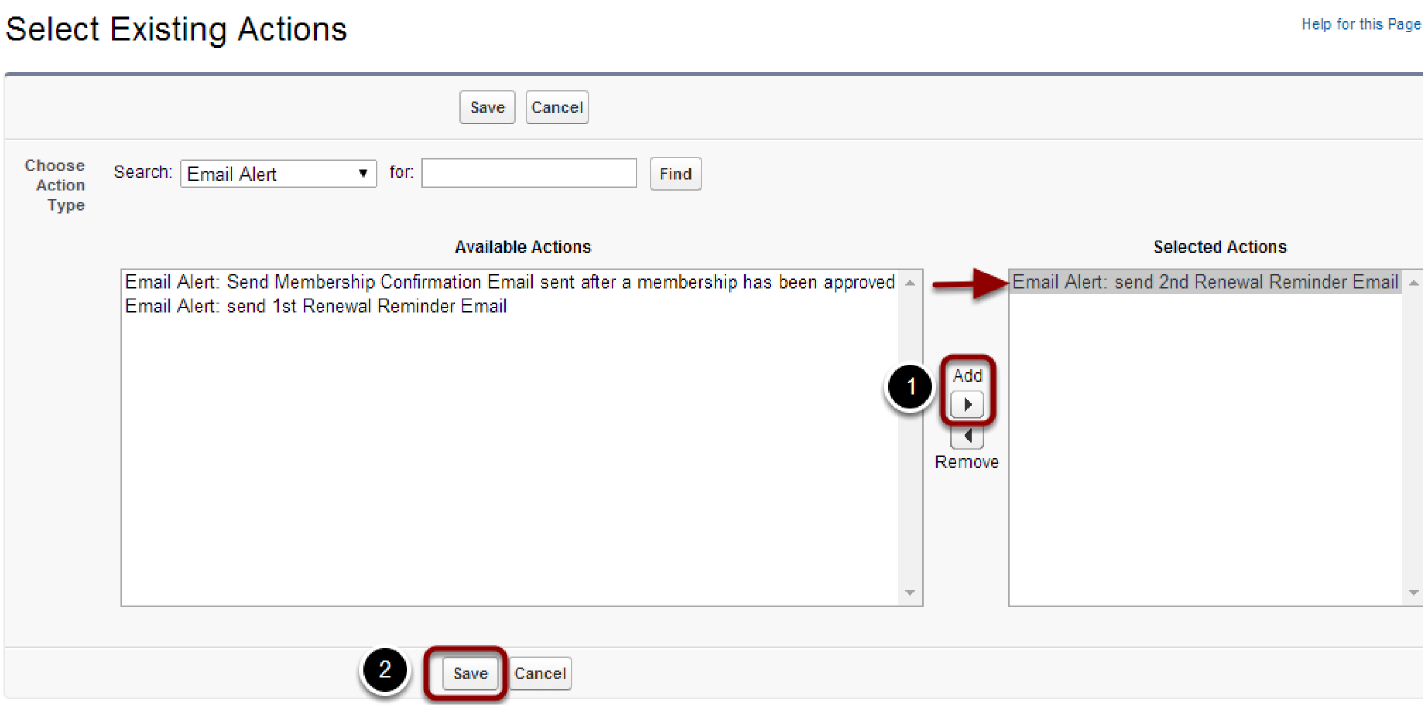
Select 'Select Existing Action from the drop down menu



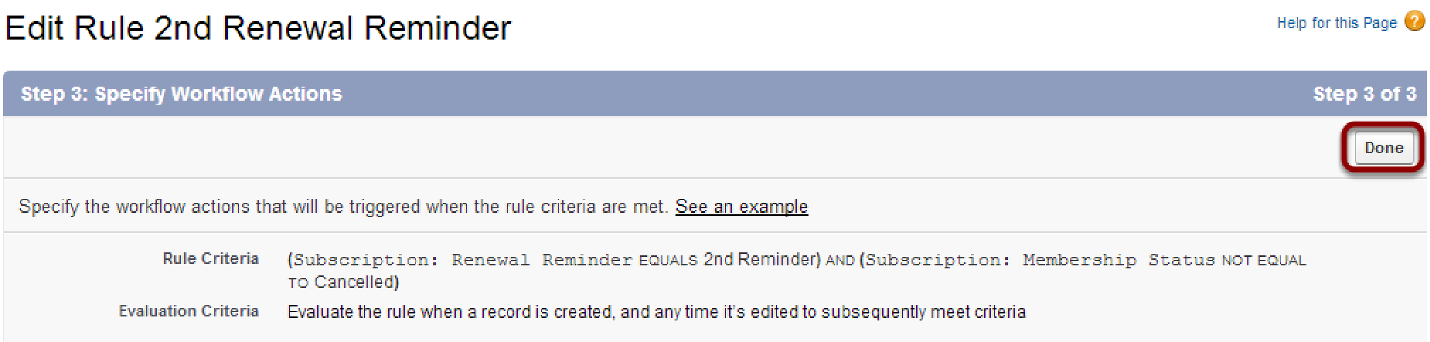
Select 'Email Alert' from the Choose Action Type drop down menu



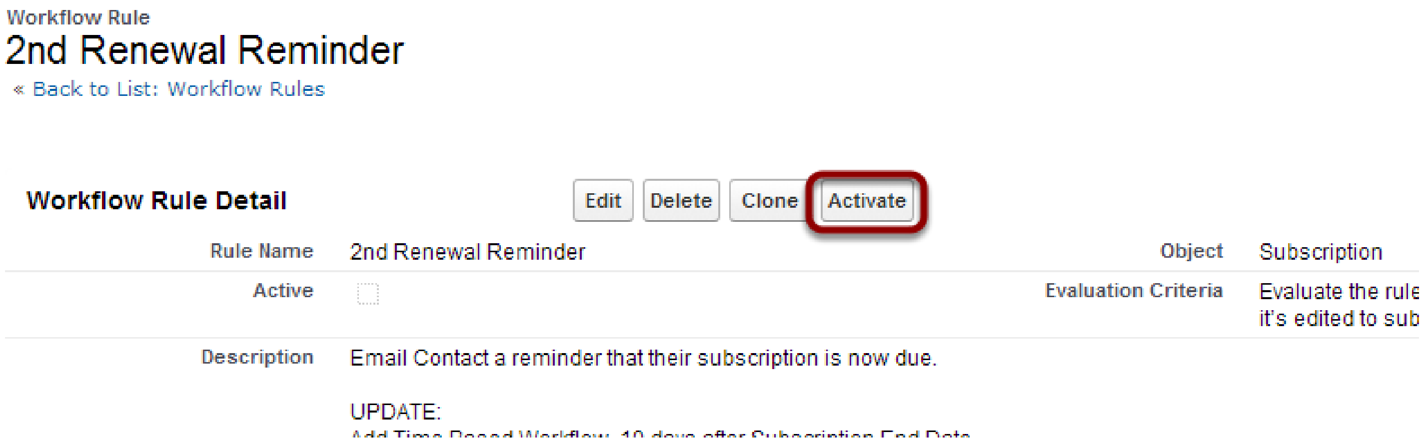
Add 'Email Alert: send 2nd Renewal Reminder Email' and Save



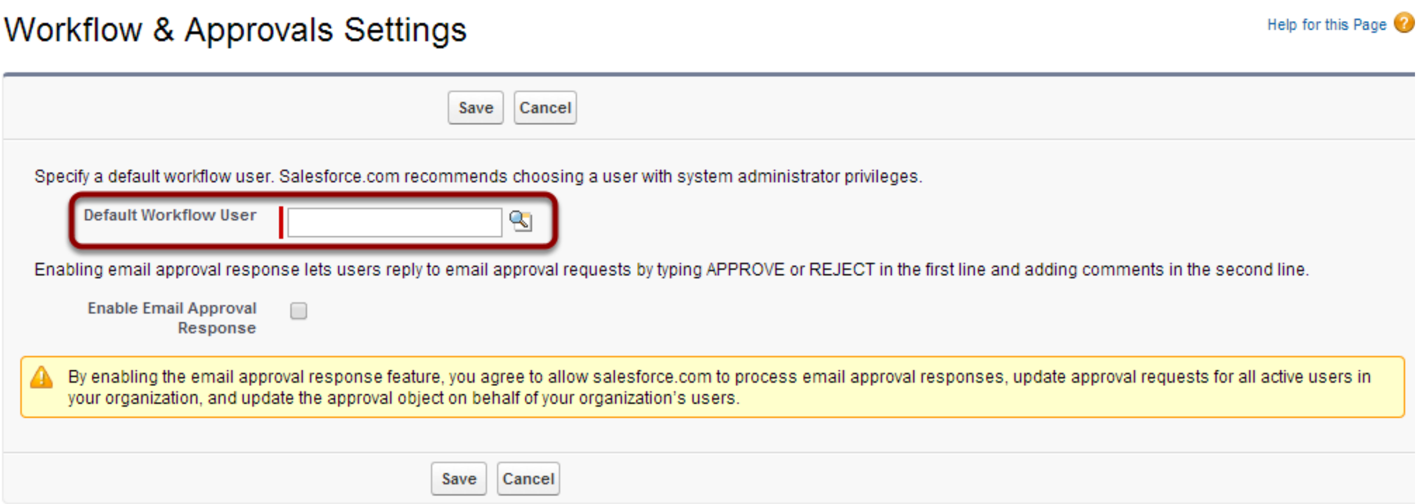
Select 'Done' button to complete the workflow rule



Select 'Activate' to begin the workflow process

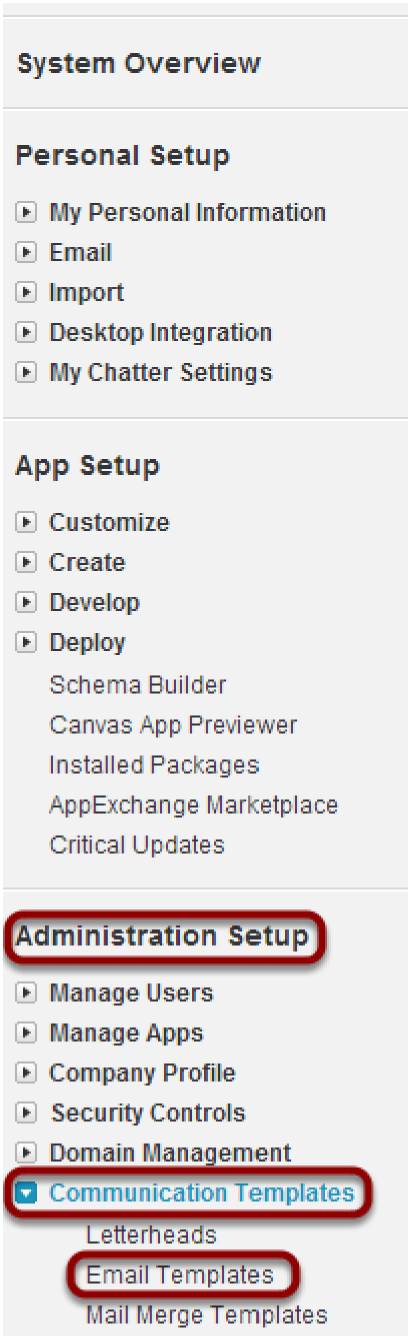


Set 'Default Workflow User' and Save

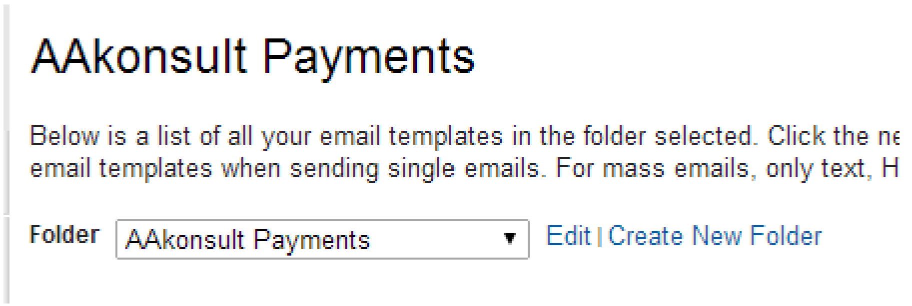


If a Default Workflow User has already been set, this step will be skipped.

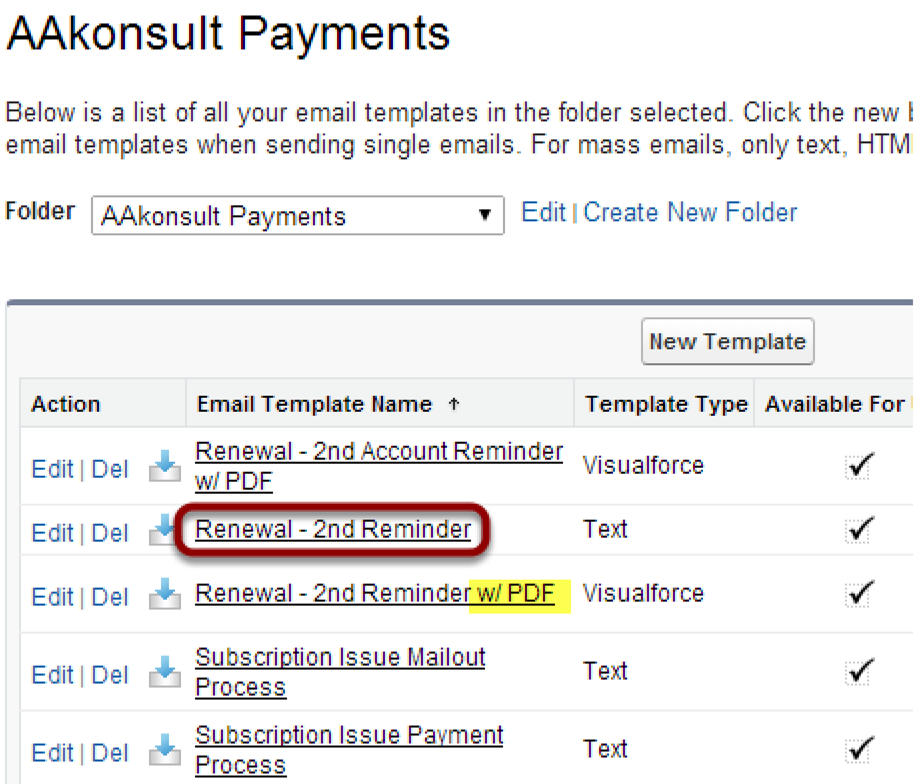
Review email template for 2nd Reminder [Setup > Administration Setup> Communication Templates > Email Templates]



Select AAkonsult Payments from the drop down Folder list

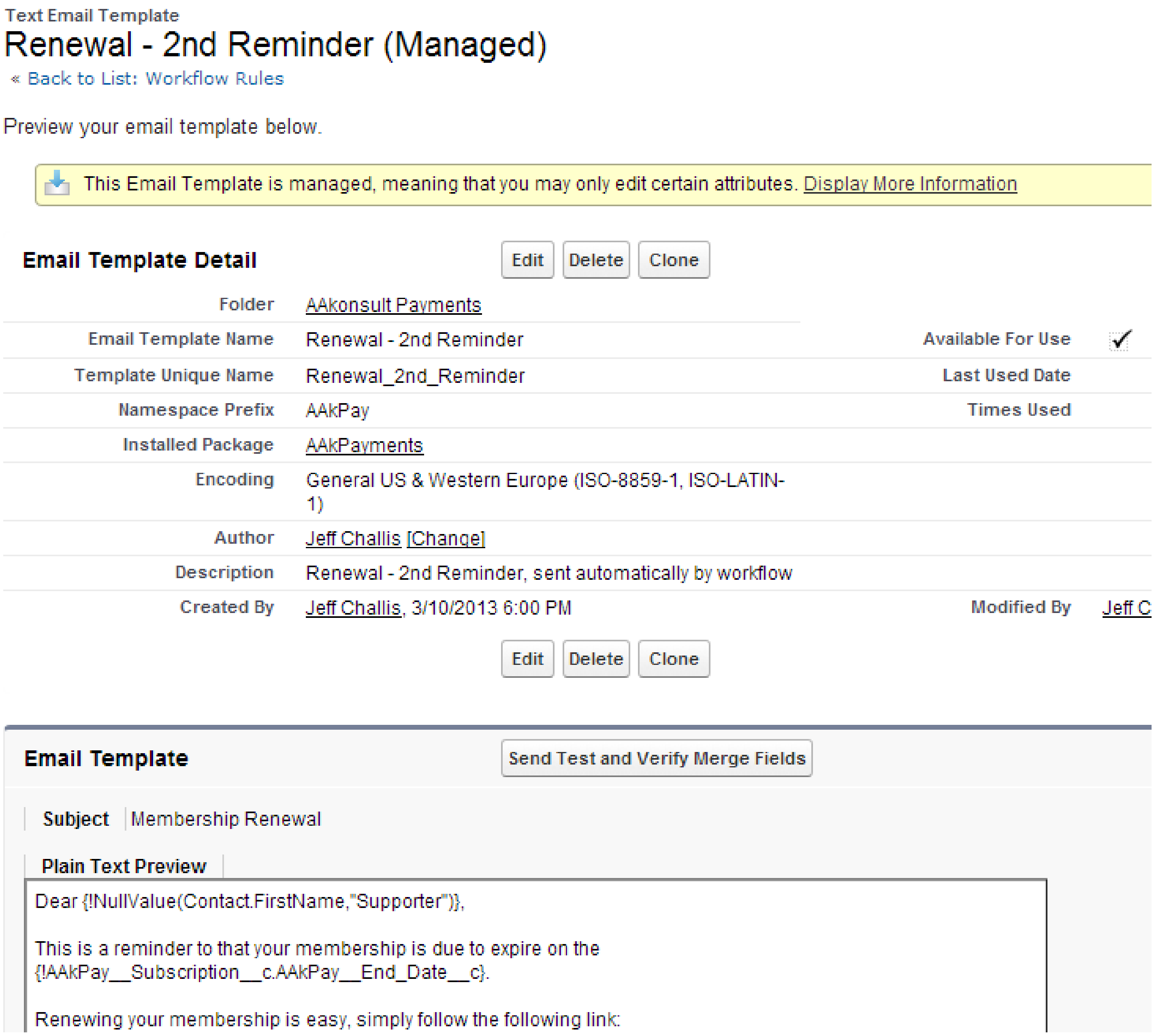


Scroll down to find 'Renewal - 2nd Reminder'



A template with a PDF attachment is also available.

Edit and test your template



How to send out first automated reminders - account level

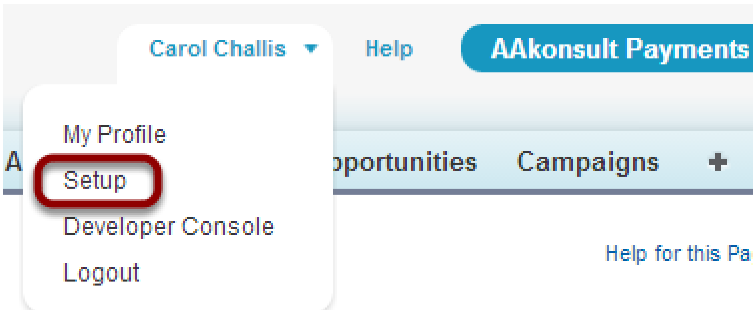
For first membership reminders at an Account (organisational) level.

The workflow setup process is very similar to the “WORKFLOW: First Renewal Reminder Contact Level” and “WORKFLOW: Second Renewal Reminder Contact Level” processes described above. With the exception of basing the template workflows from “1st Account Subscription Renewal Reminder [ADD TIME BASED WORKFLOW]” and “2nd Account Subscription Renewal Reminder [ADD TIME BASED WORKFLOW]”.

Quick Steps:

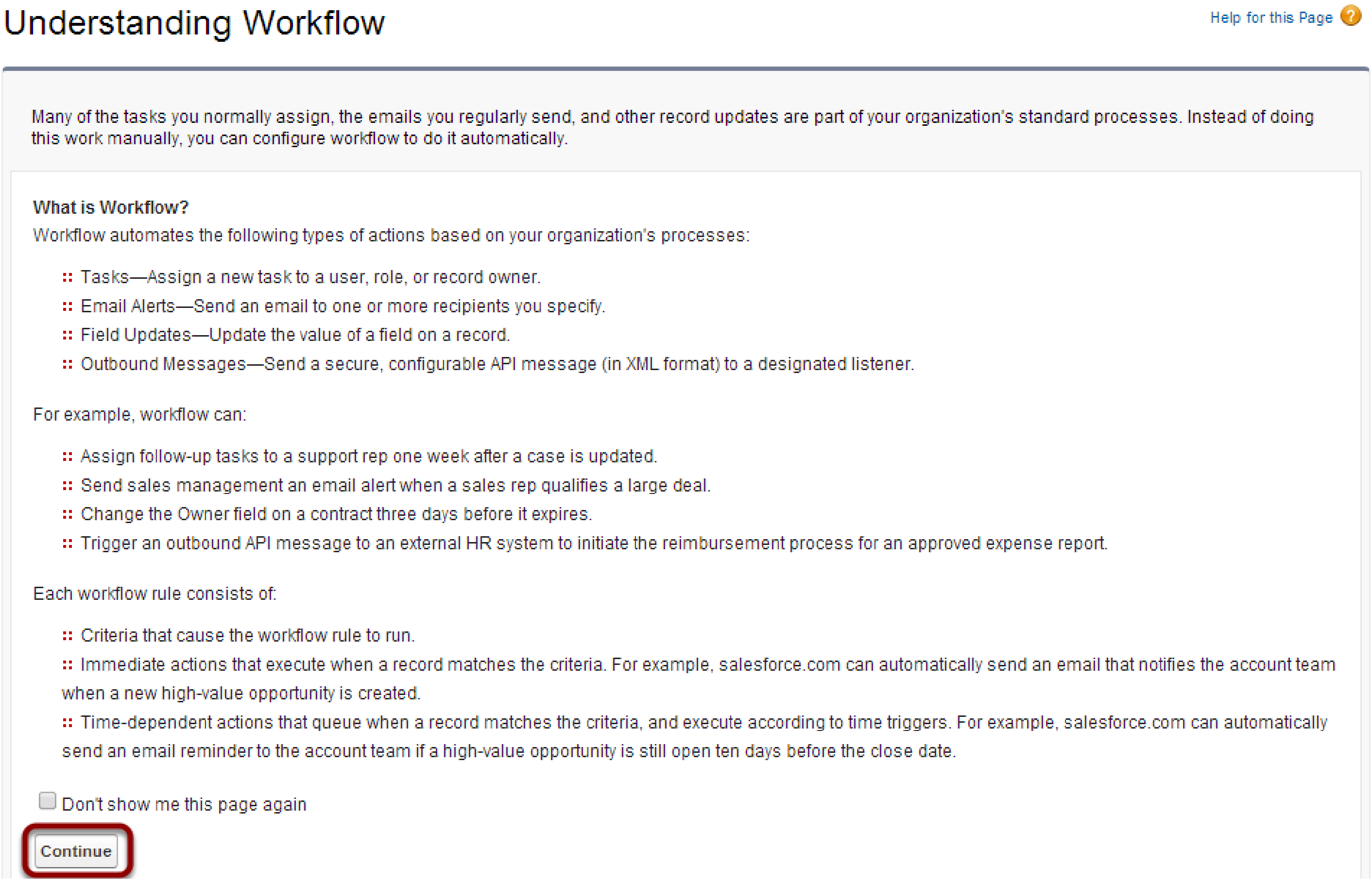
1. Clone Workflow rule "1st Account Subscription Renewal Reminder [ADD TIME BASED WORKFLOW]" and rename to "1st Account Subscription Renewal Reminder"
2. Add Immediate Workflow Actions. Select Existing - Field Update "Set 1st Account Reminder"
3. Add a Time-Dependant Action. Set it to fire 30 days before Account Subscription End Dates (or time period you would like).
   Add Action - use existing workflow - "Email Alert: send 1st Account Subscription Renewal Reminder Email"
   Add Action - use existing workflow - "Field Update: set 2nd Reminder Due"
4. Optionally review and update the renewal reminder email templates.

1. Navigate to Setup > App Setup > Create > Workflow & Approvals > Workflow Rules



1.1 Select 'Workflow Rules'

2. Read about Workflows and select 'Continue'


Understanding Workflow

Help for this Page

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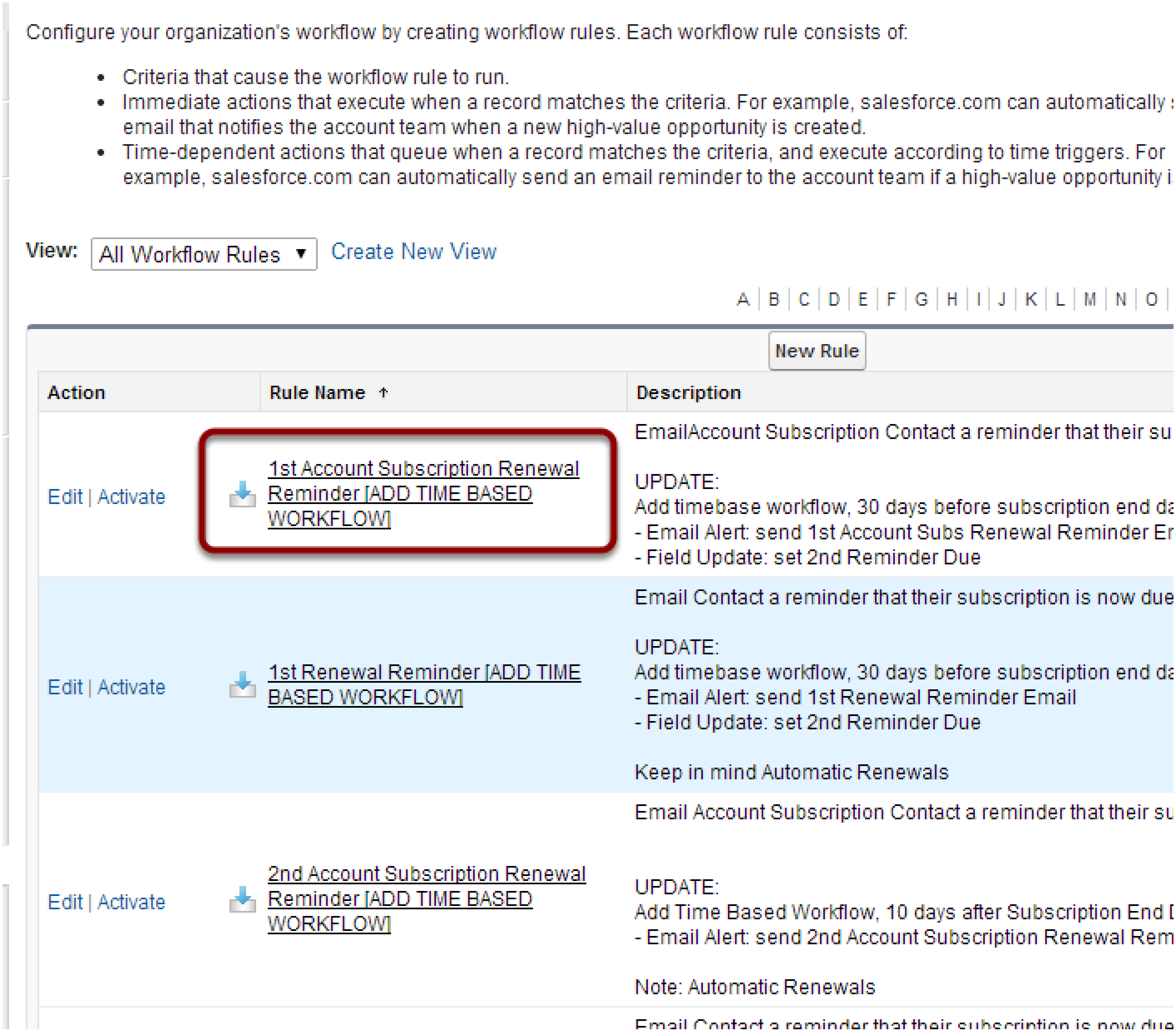
Don't show me this page again

Continue

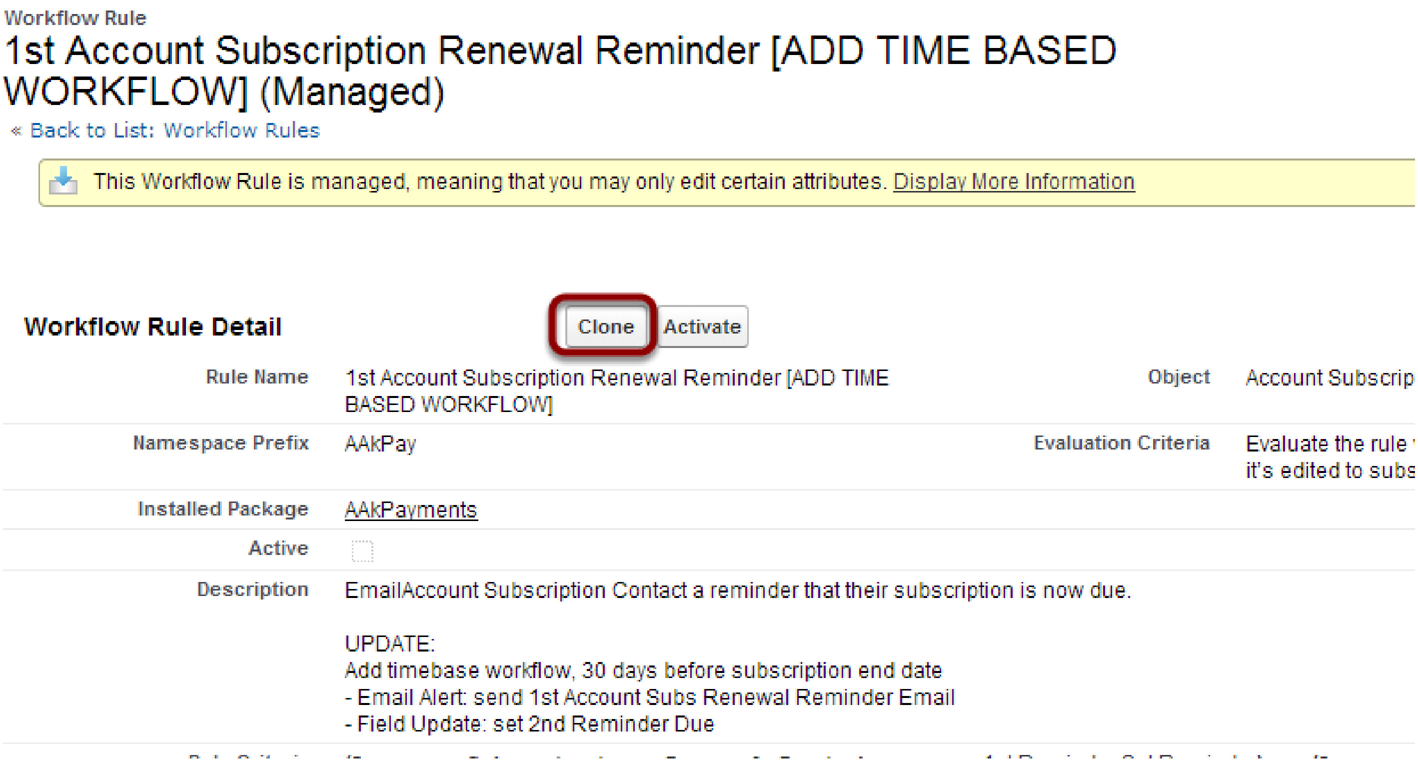
This page can be turned off.

3. Select '1st Account Subscription Renewal Reminder [ADD TIME BASED WORKFLOW]'

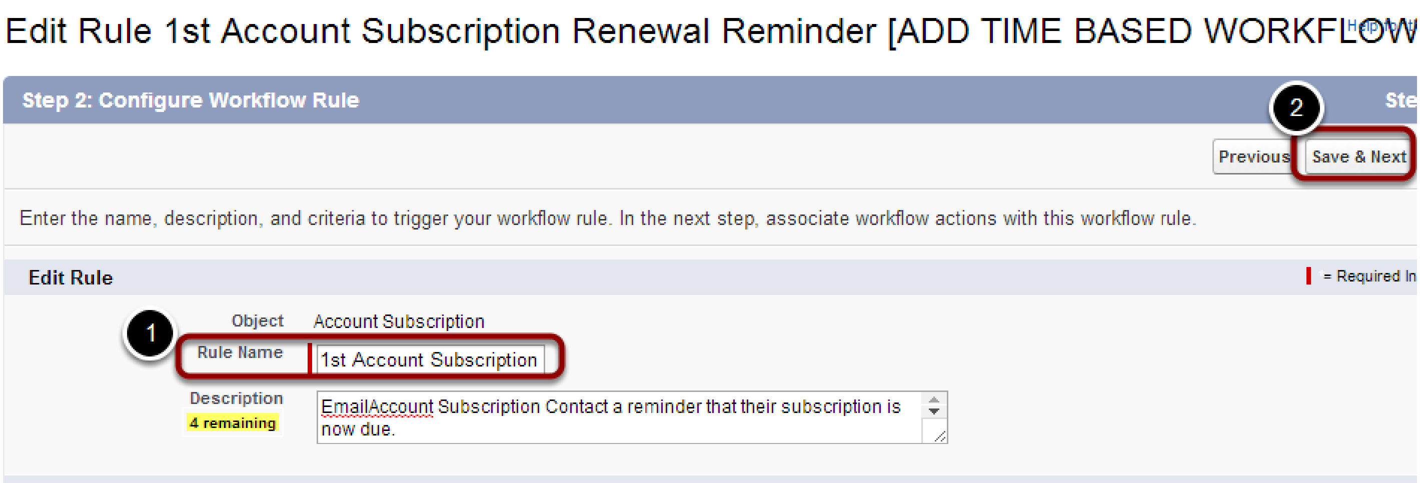


Open the circled rule

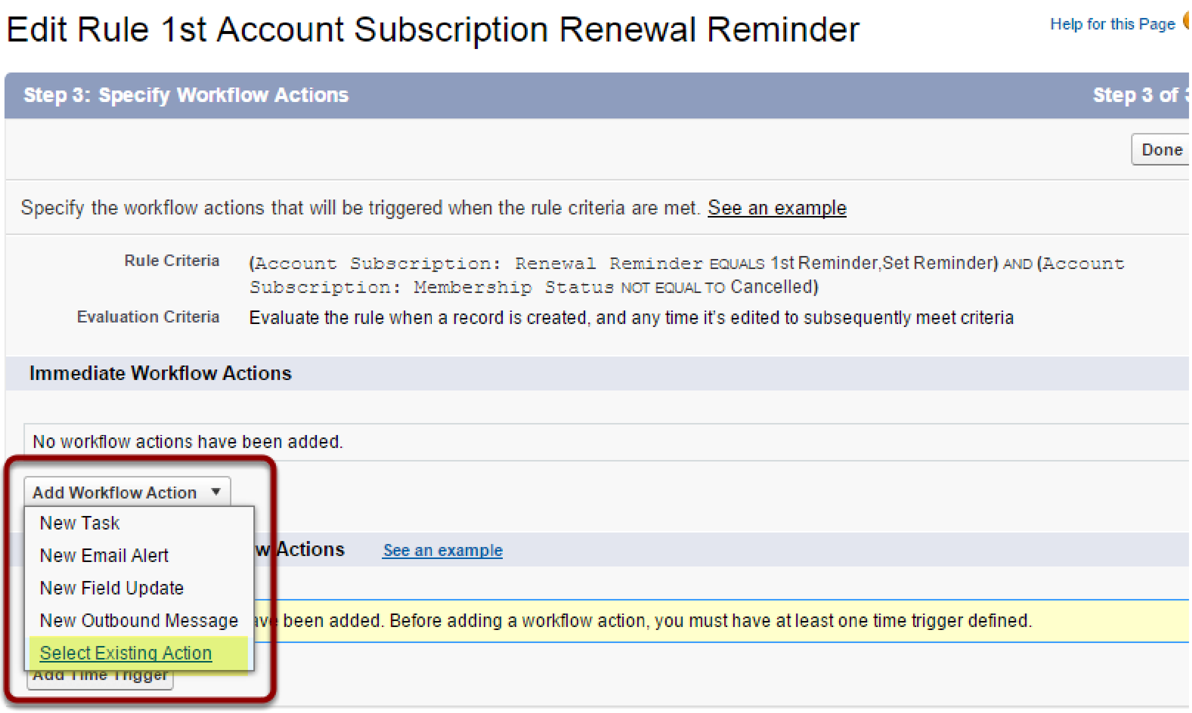
4. Select 'Clone'



4.1 Re-name the workflow rule '1st Account Subscription' and select 'Save & Next'

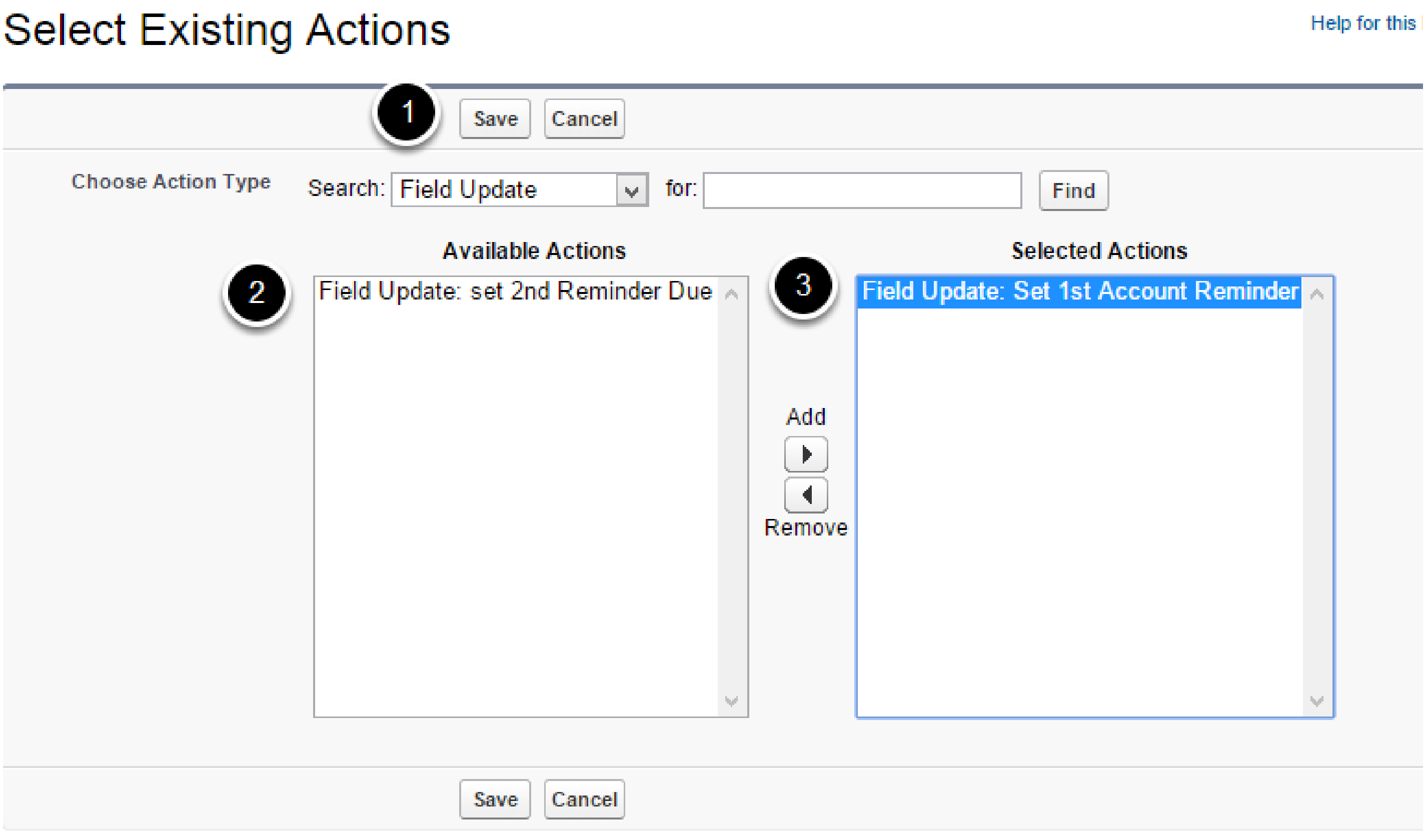


5. Select the 'Add Workflow Action'



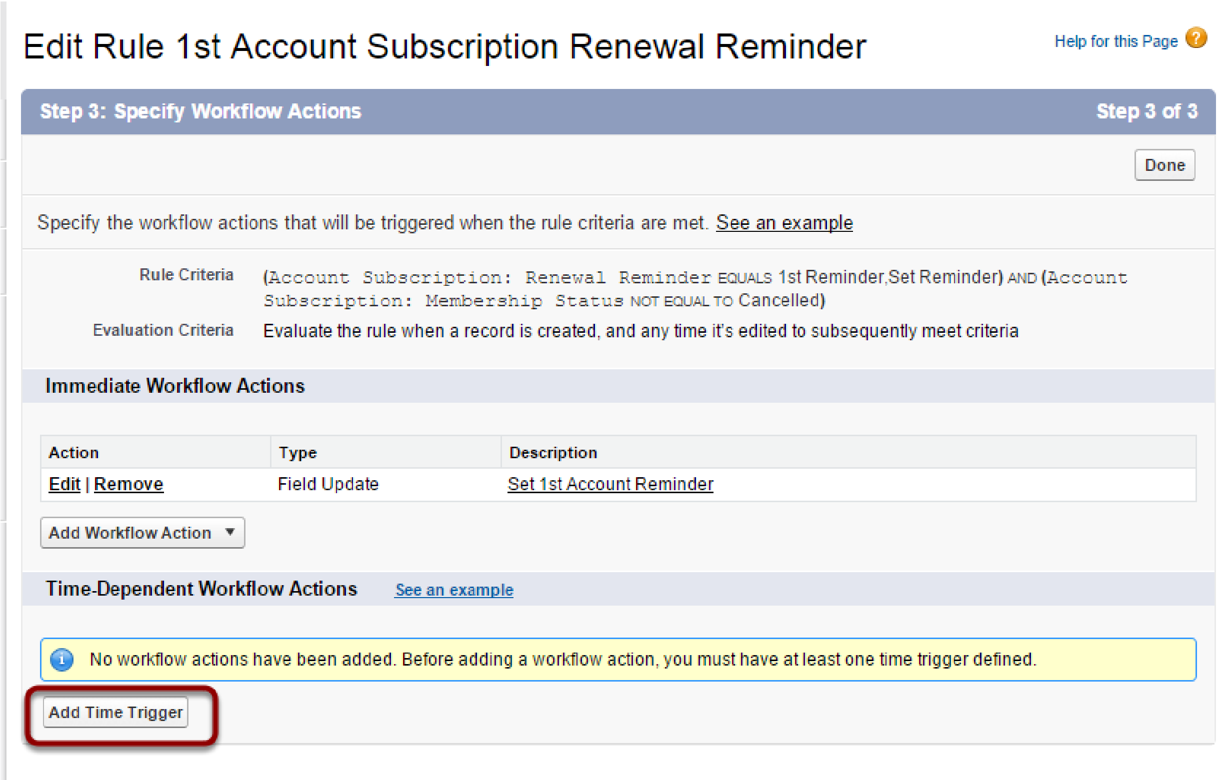
Select Add Workflow Action under the "Immediate Workflow Actions" Sections. Then 'Select Existing Action'.

5.1 Add existing field update - Set First Reminder Due

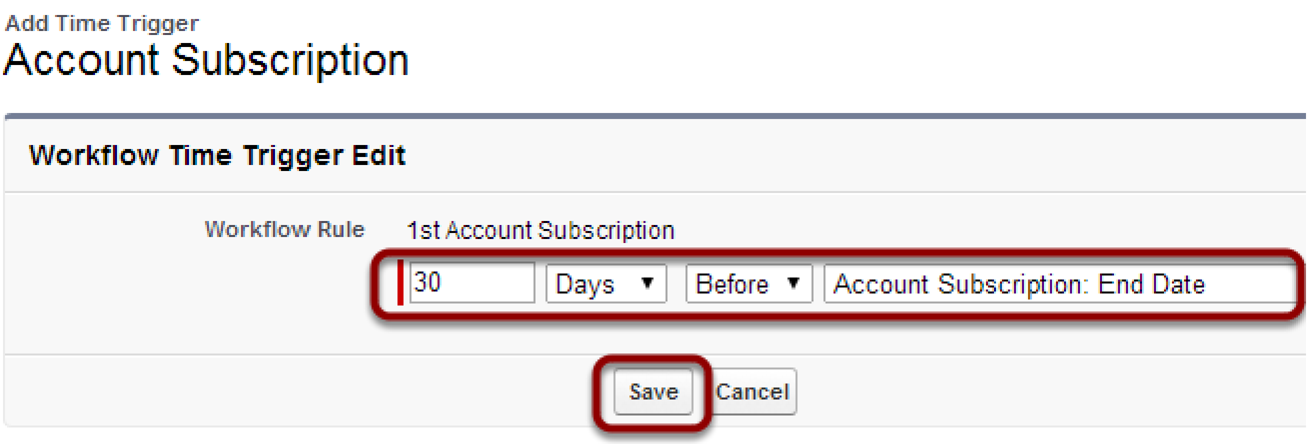


Then select Field Update from the Action Type and move "Set First Reminder" to the 'Selected Actions' and Save.

6. Select the 'Add Time Trigger' button

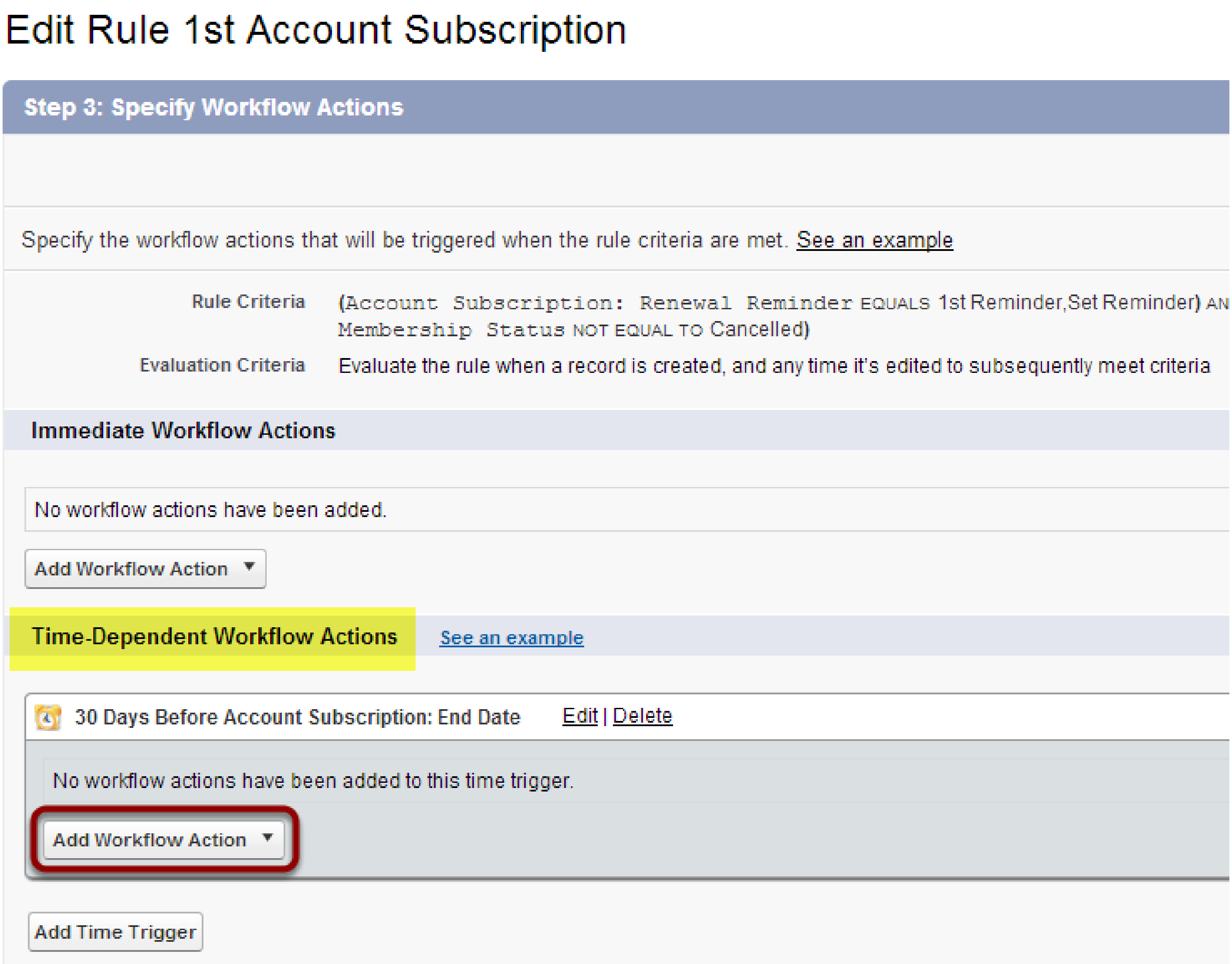


6.1 Set Time Trigger to '30 days before Subscription End Date' and Save

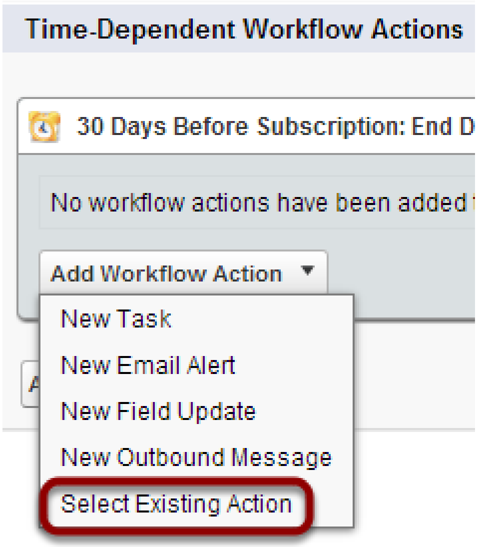


Note: You can change the number of days as required if you wish to give more/less notice.

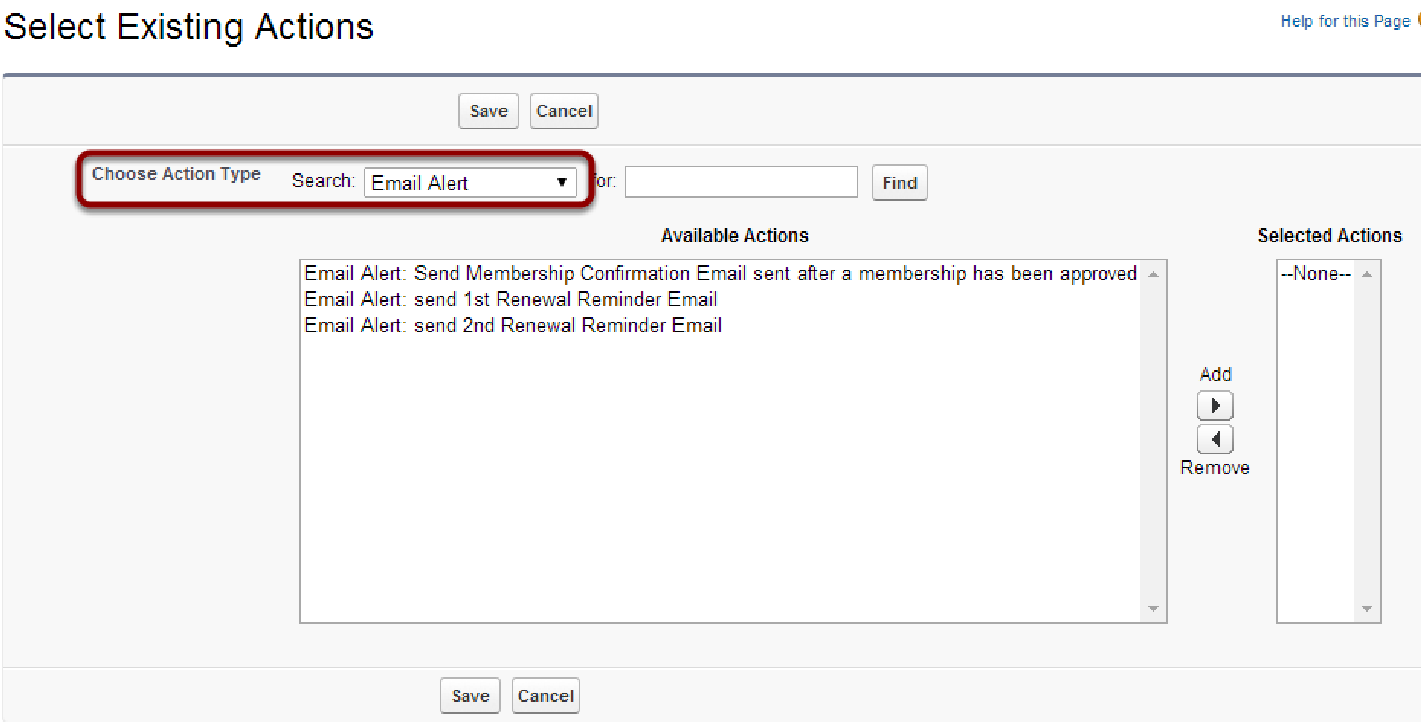
7. Select the 'Add Workflow Action' button in the Time Dependent Workflow Action section.



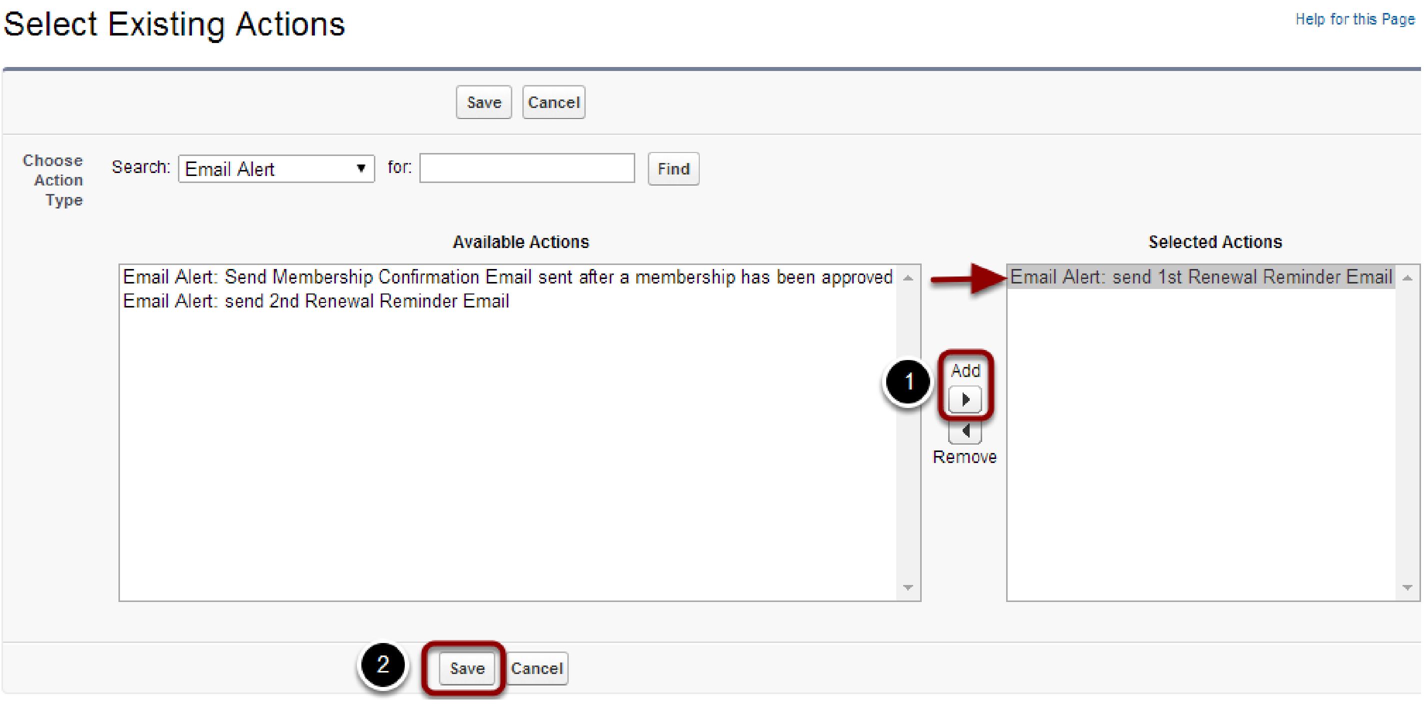
7.1 Select 'Select Existing Action from the drop down menu



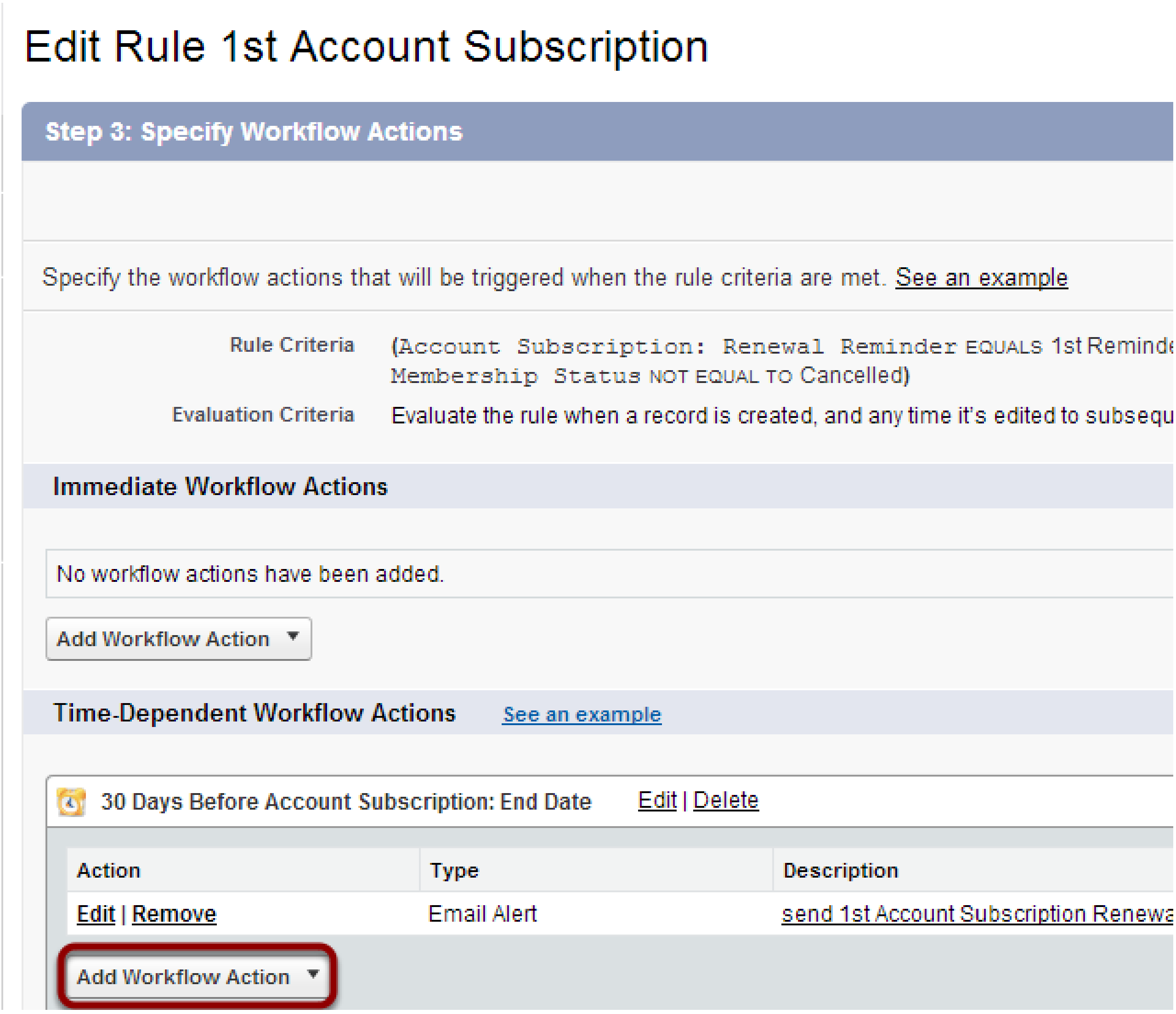
7.2 Select 'Email Alert' from the Choose Action Type drop down menu



7.3 Add 'Email Alert: send 1st Renewal Reminder Email' and Save

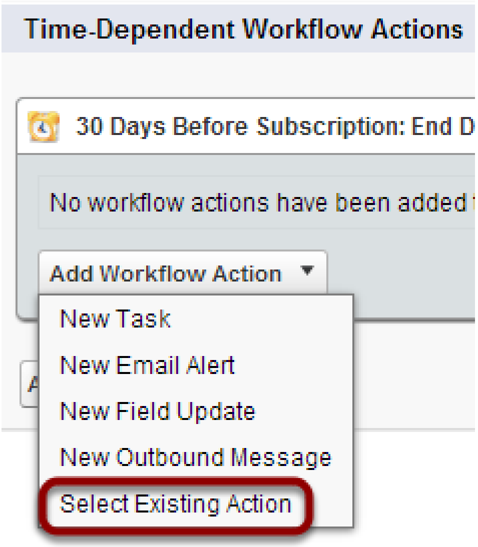


8. Select the 'Add Workflow Action' button in the Time Dependent Workflow Action section.

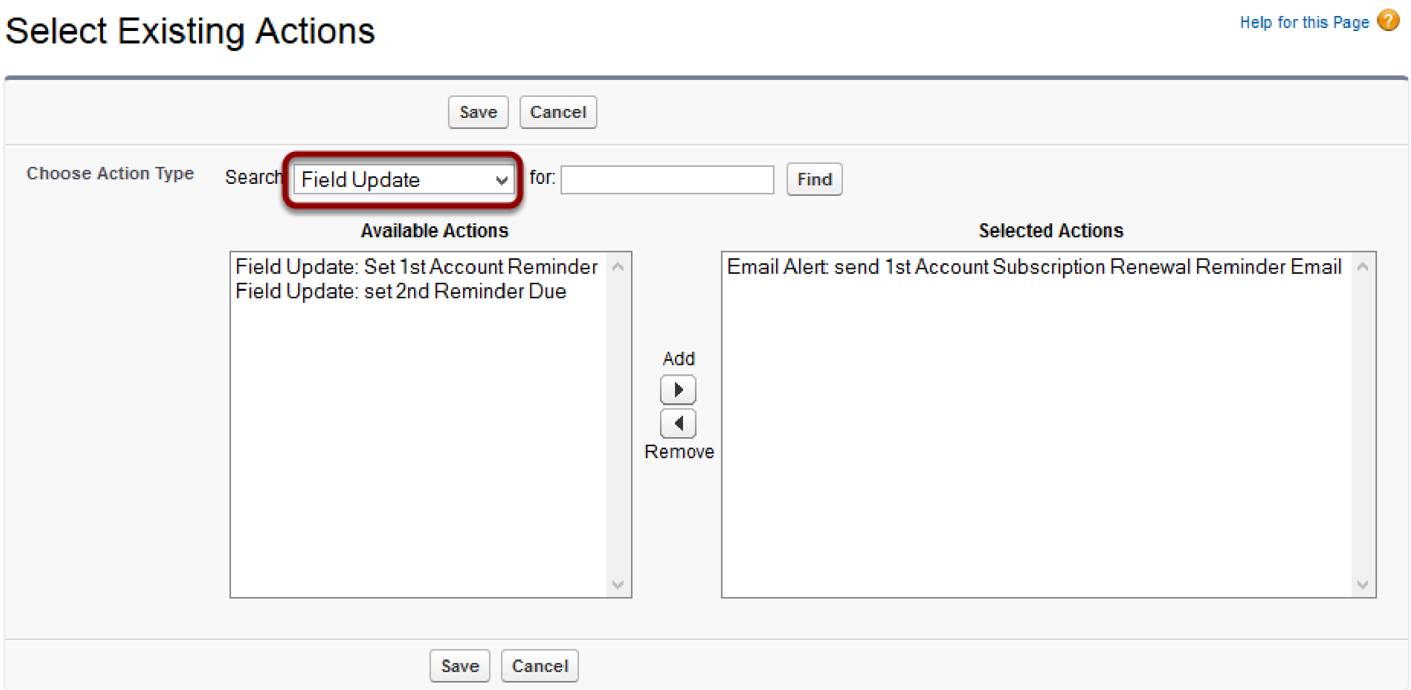


This Workflow Action is set as a trigger for the 2nd Reminder.

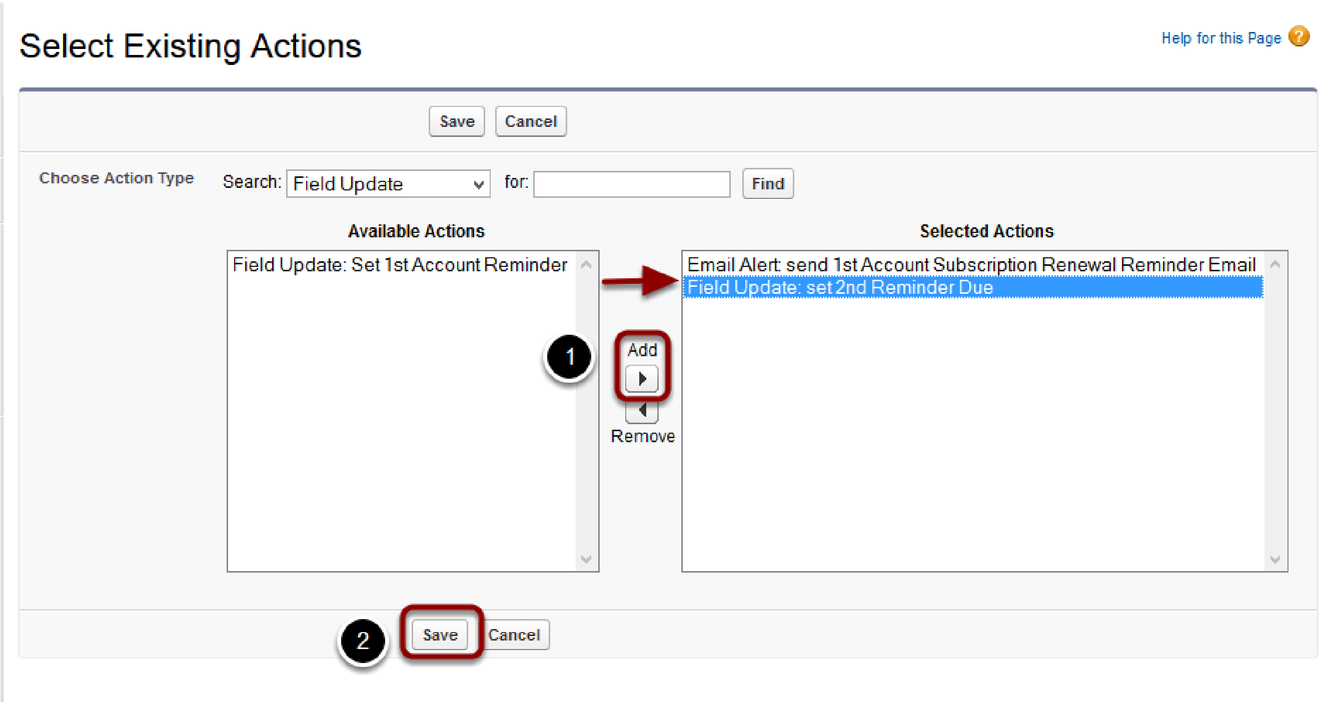
8.1 Select 'Select Existing Action from the drop down menu



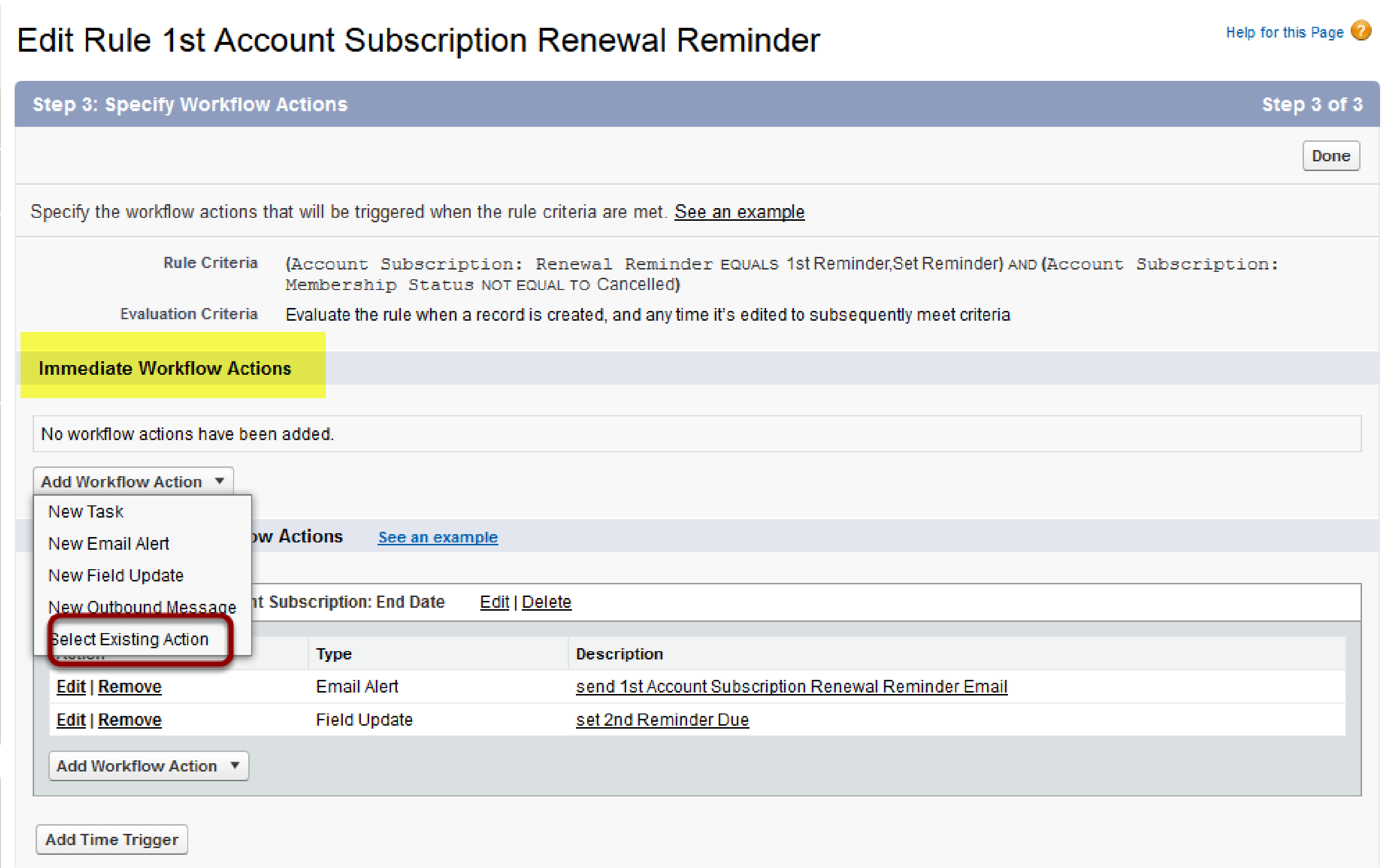
8.2 Select 'Field Update' from the Choose Action Type drop down menu



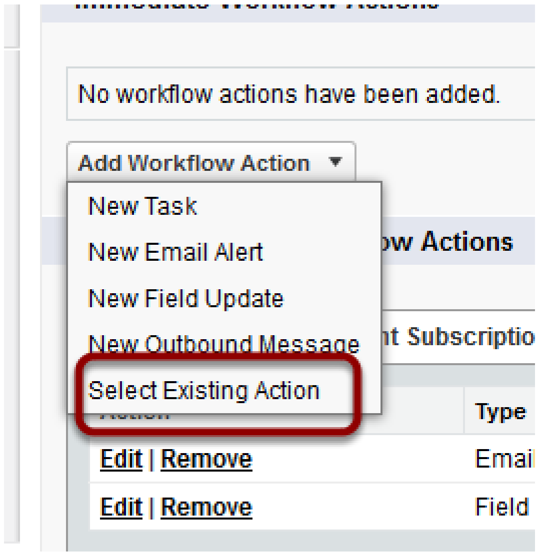
8.3 Add 'Field Update: set 2nd Reminder Due' and press Save



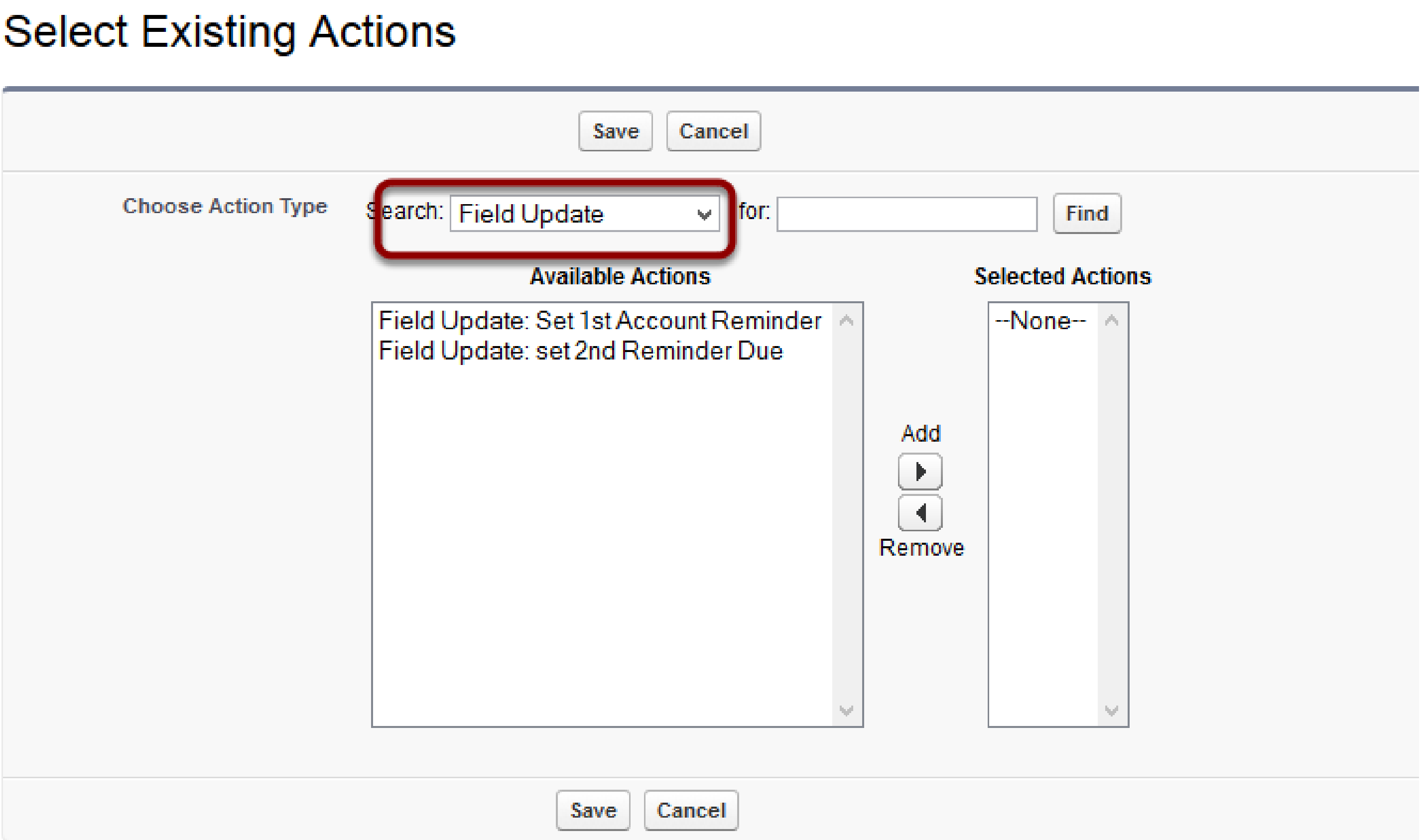
9. Select the Add Immediate Workflow Actions Section



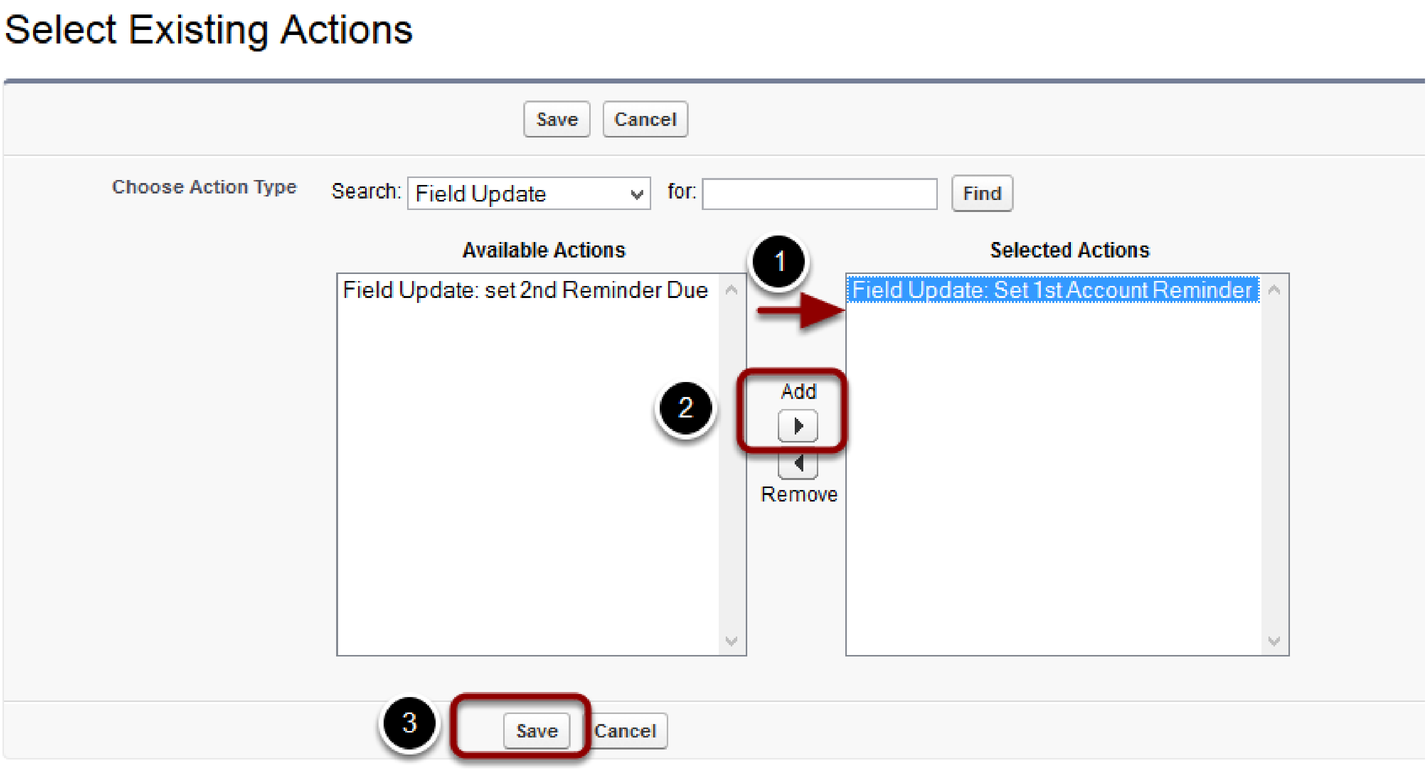
9.1 Select 'Select Existing Action'



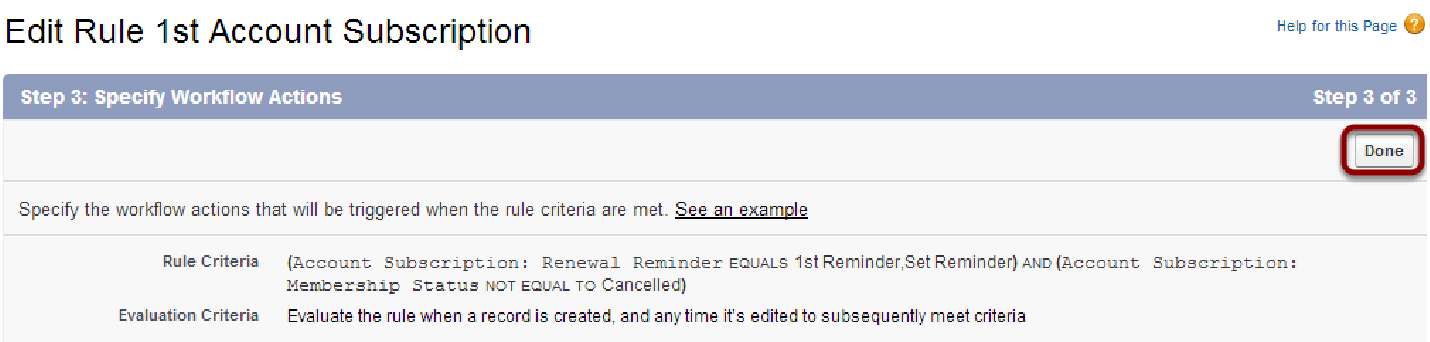
9.2 Select 'Field Update' from the Choose Action Type drop down menu



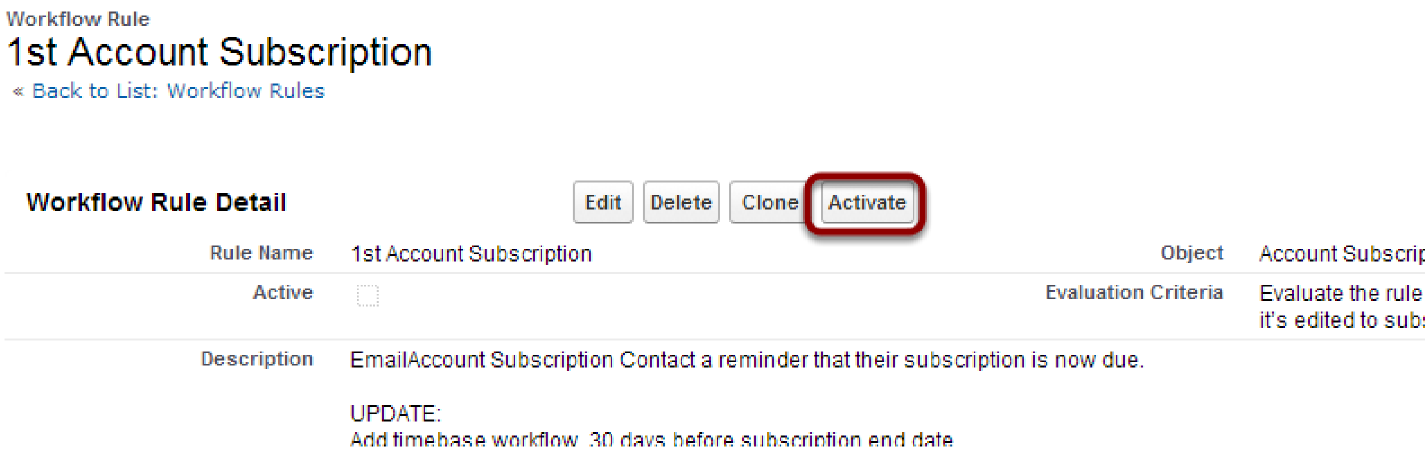
9.3 Add 'Field Update: Set 1st Account Reminder'



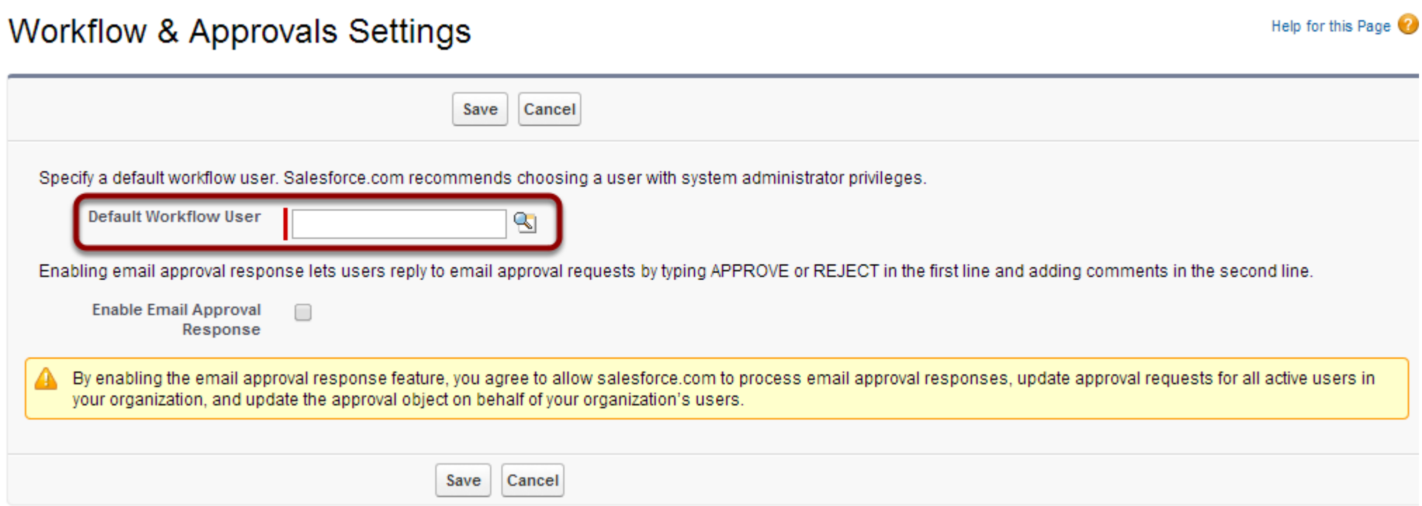
10. Select 'Done' button to complete the workflow rule



10.1 Select 'Activate' to begin the workflow process

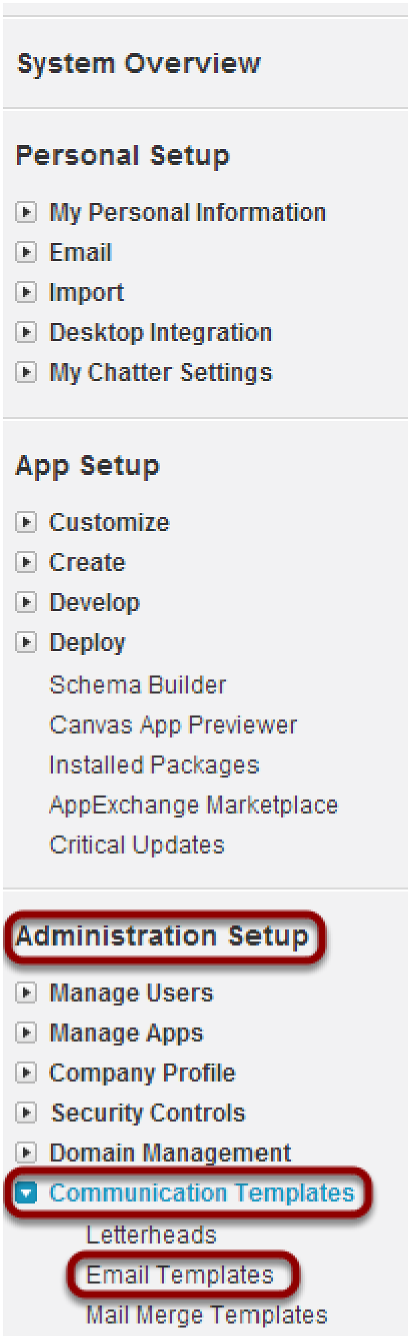


10.2 Set 'Default Workflow User' and Save

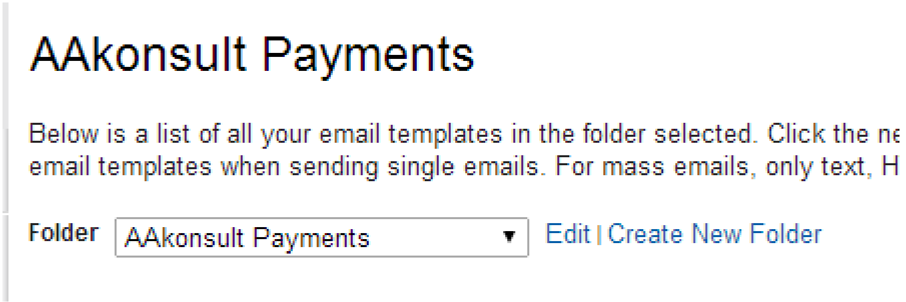


If a Default Workflow User has already been set, this step will be skipped.

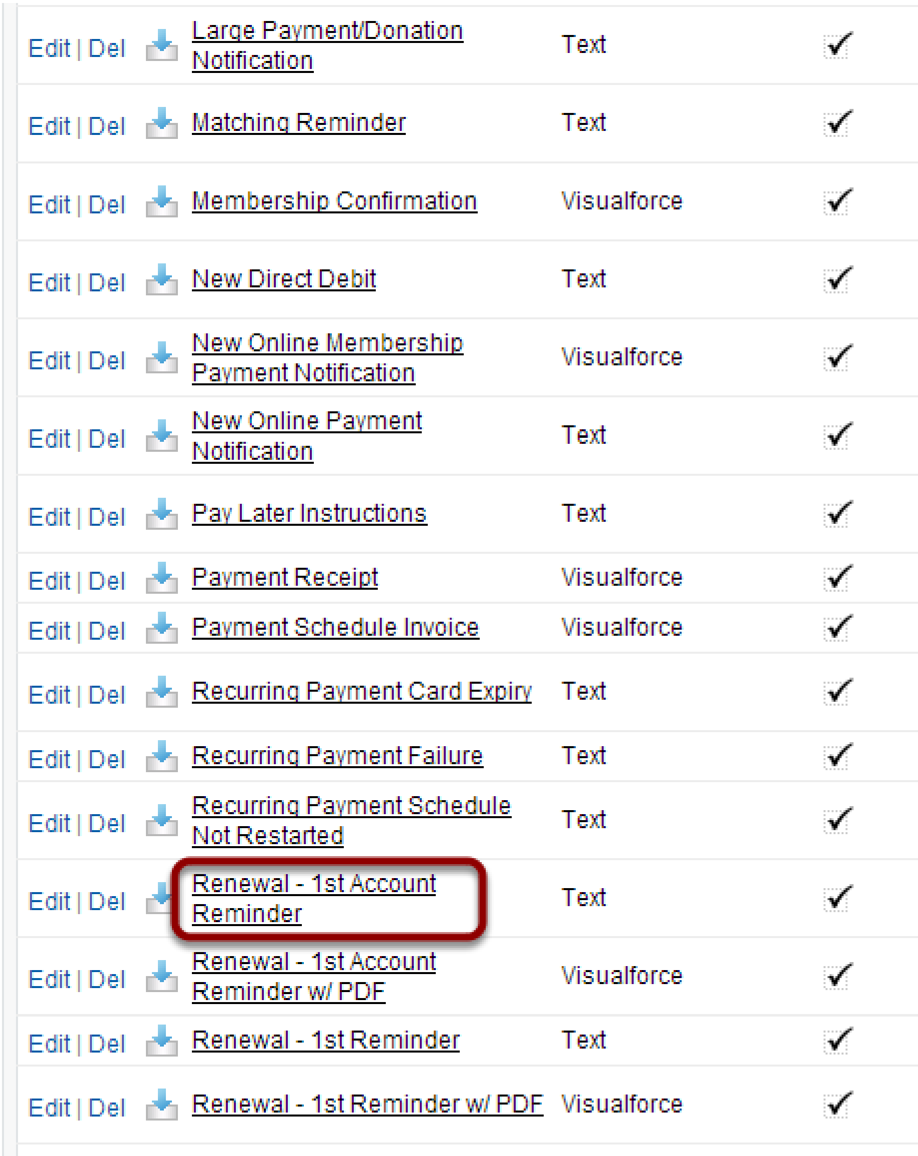
11. Review email template for 1st Reminder [Setup > Administration Setup> Communication Templates > Email Templates]



11.1 Select AAkonsult Payments from the drop down Folder list



11.2 Scroll down to find 'Renewal - 1st Account Reminder'



A template with a pdf attachment is also available.

11.3 Edit and test your template

Text Email Template

Renewal - 1st Account Reminder (Managed)

« Back to List: Workflow Rules

Preview your email template below.

This Email Template is managed, meaning that you may only edit certain attributes. Display More Information

Email Template Detail Edit Delete Clone

Folder	AAkonsult Payments		
Email Template Name	Renewal - 1st Account Reminder	Available For Use	✓
Template Unique Name	Renewal_1st_Account_Reminder	Last Used Date	
Namespace Prefix	AAkPay	Times Used	
Installed Package	AAkPayments		
Encoding	General US & Western Europe (ISO-8859-1, ISO-LATIN-1)		
Author	Jeff Challis [Change]		
Description	Renewal - 1st Account Subscription Reminder, sent automatically by workflow		
Created By	Jeff Challis, 3/10/2013 6:00 PM	Modified By	Jeff C

Edit Delete Clone

Email Template Send Test and Verify Merge Fields

Subject Membership Renewal

Plain Text Preview

Dear {!NullValue(Contact.FirstName,"Supporter")},

Your membership is due to expire on the {!AAkPay__Account_Subscription__c.AAkPay__End_Date__c}.

Renewing your membership is easy, simply follow the following link:
{!AAkPay__Account_Subscription__c.AAkPay__Renewal_URL__c}

Regards
The team at {!Organization.Name}

How to send out second automated reminders - account level

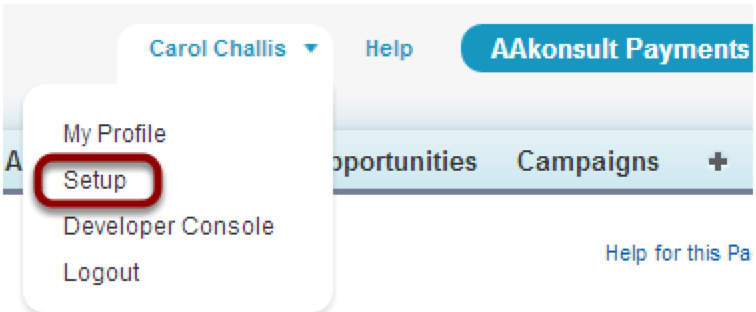
For second membership reminders at an organisational level.

The workflow setup process is very similar to the “WORKFLOW: First Renewal Reminder Contact Level” and “WORKFLOW: Second Renewal Reminder Contact Level” processes described above. With the exception of basing the template workflows from “1st Account Subscription Renewal Reminder [ADD TIME BASED WORKFLOW]” and “2nd Account Subscription Renewal Reminder [ADD TIME BASED WORKFLOW]”.

Quick Steps:

1. Clone Workflow rule " 2nd Account Subscription Renewal Reminder [ADD TIME BASED WORKFLOW]" and rename to "2nd Account Subscription Renewal Reminde"
2. Add a Time-Dependant Action. Set it to fire 10 days after Account Subscription End Dates (or time period you would like).
   Add Action - use existing workflow - "Email Alert: send 2nd Account Subscription Renewal Reminder Email"
3. Optionally review and update the renewal reminder email templates.

Navigate to Setup > App Setup > Create > Workflow & Approvals > Workflow Rules



Select 'Workflow Rules'

Read about Workflows and select 'Continue'

Understanding Workflow

Help for this Page

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For example, workflow can:

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Each workflow rule consists of:

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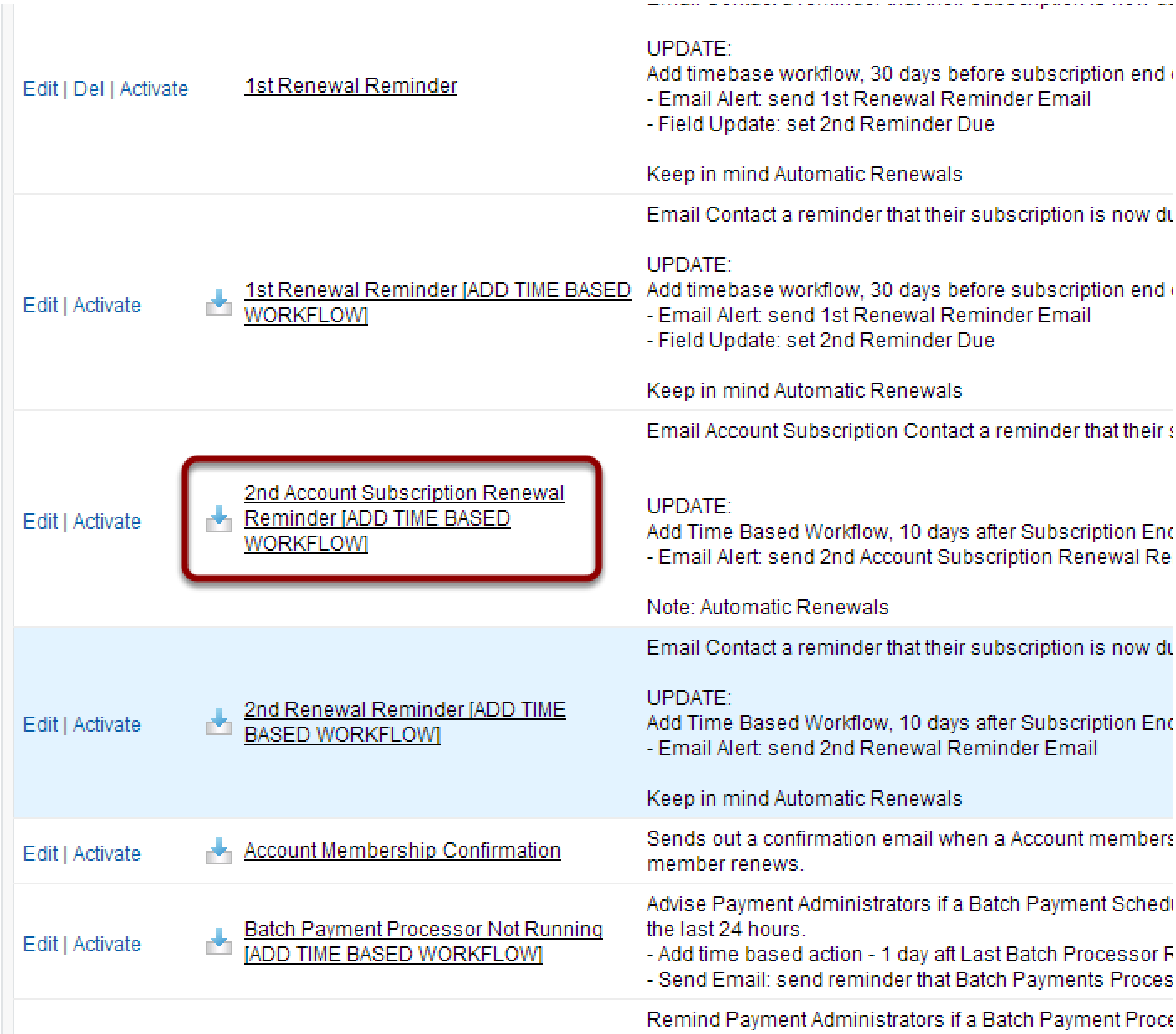
☐ Don't show me this page again

Continue

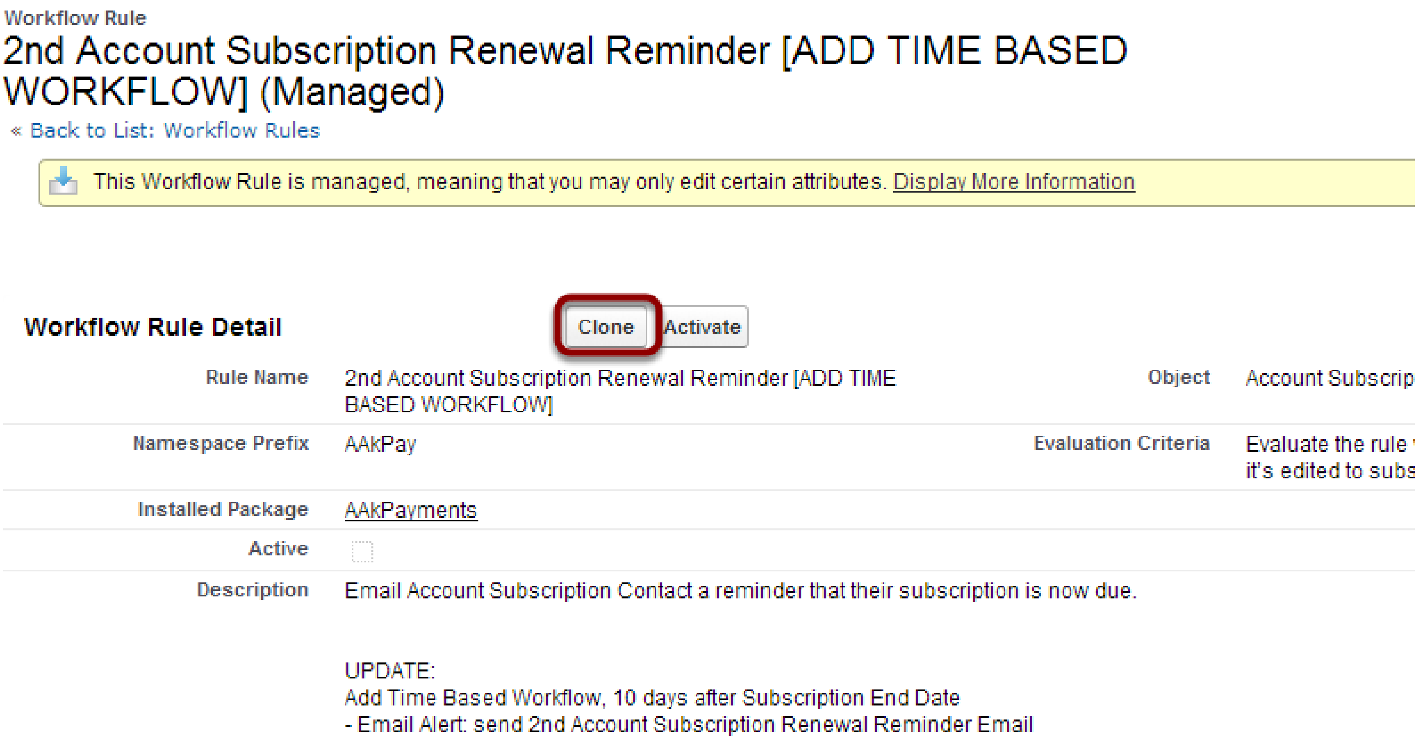
This page can be turned off.

Scroll down and select '2nd Account Subscription Renewal Reminder [ADD TIME BASED WORKFLOW]'

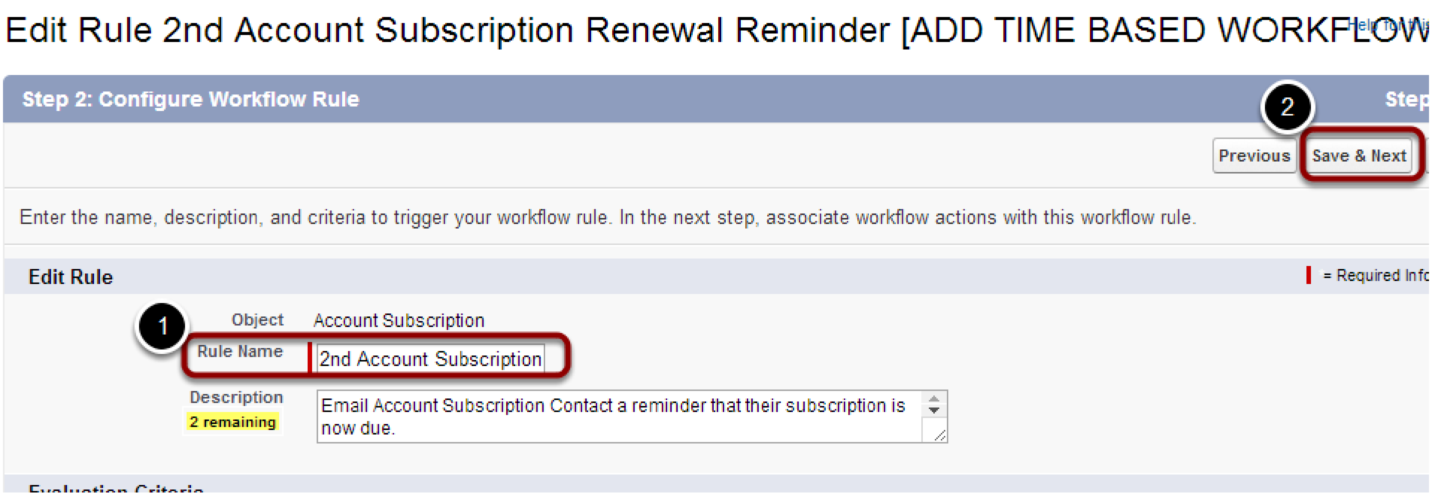


Open the circled rule

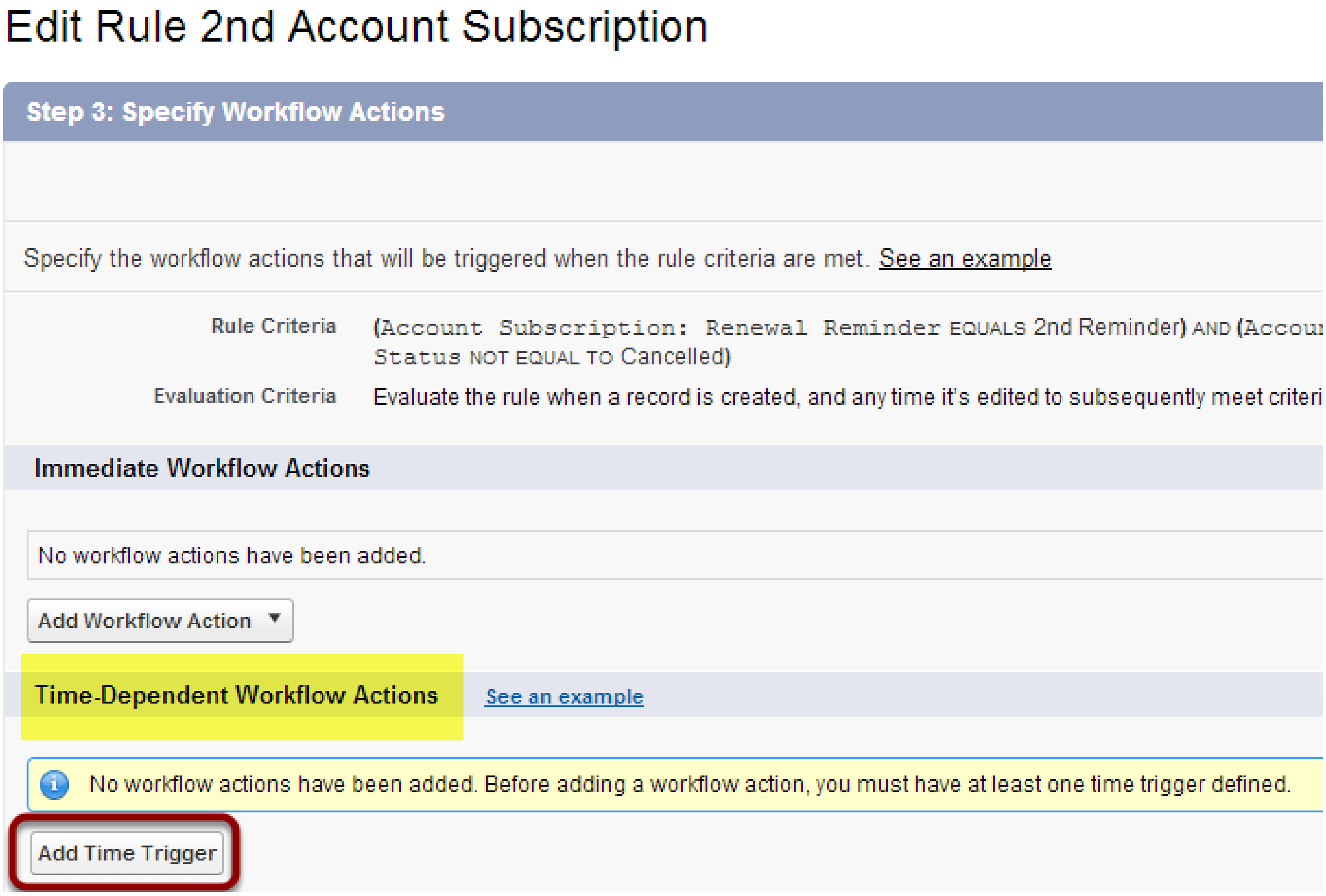
Select 'Clone'



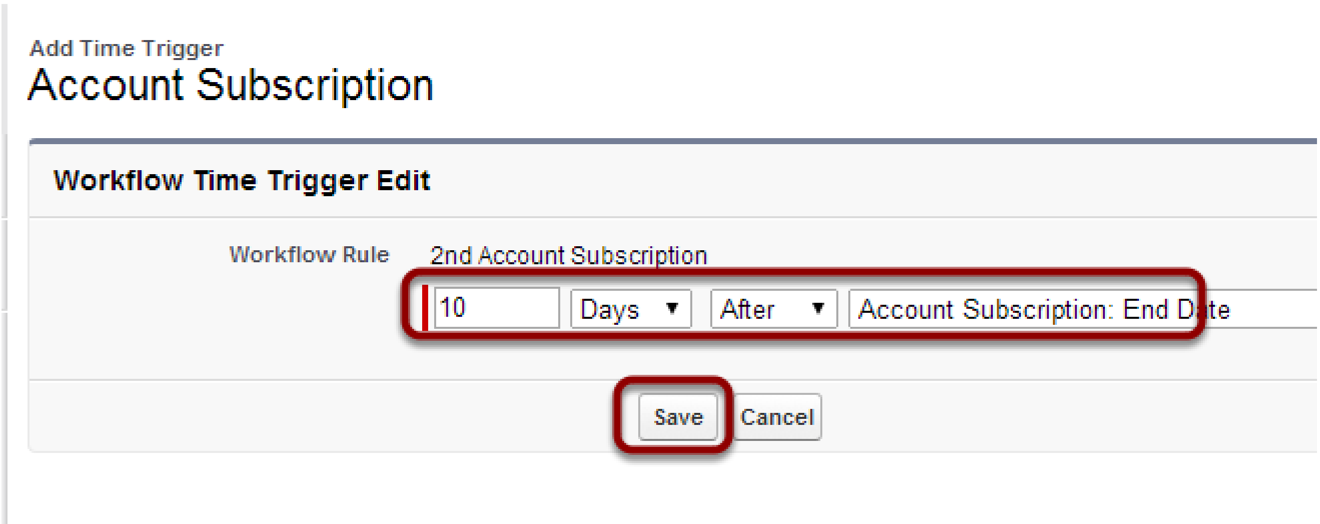
Re-name the workflow rule '2nd Account Subscription' and select 'Save & Next'



Select the 'Add Time Trigger' button

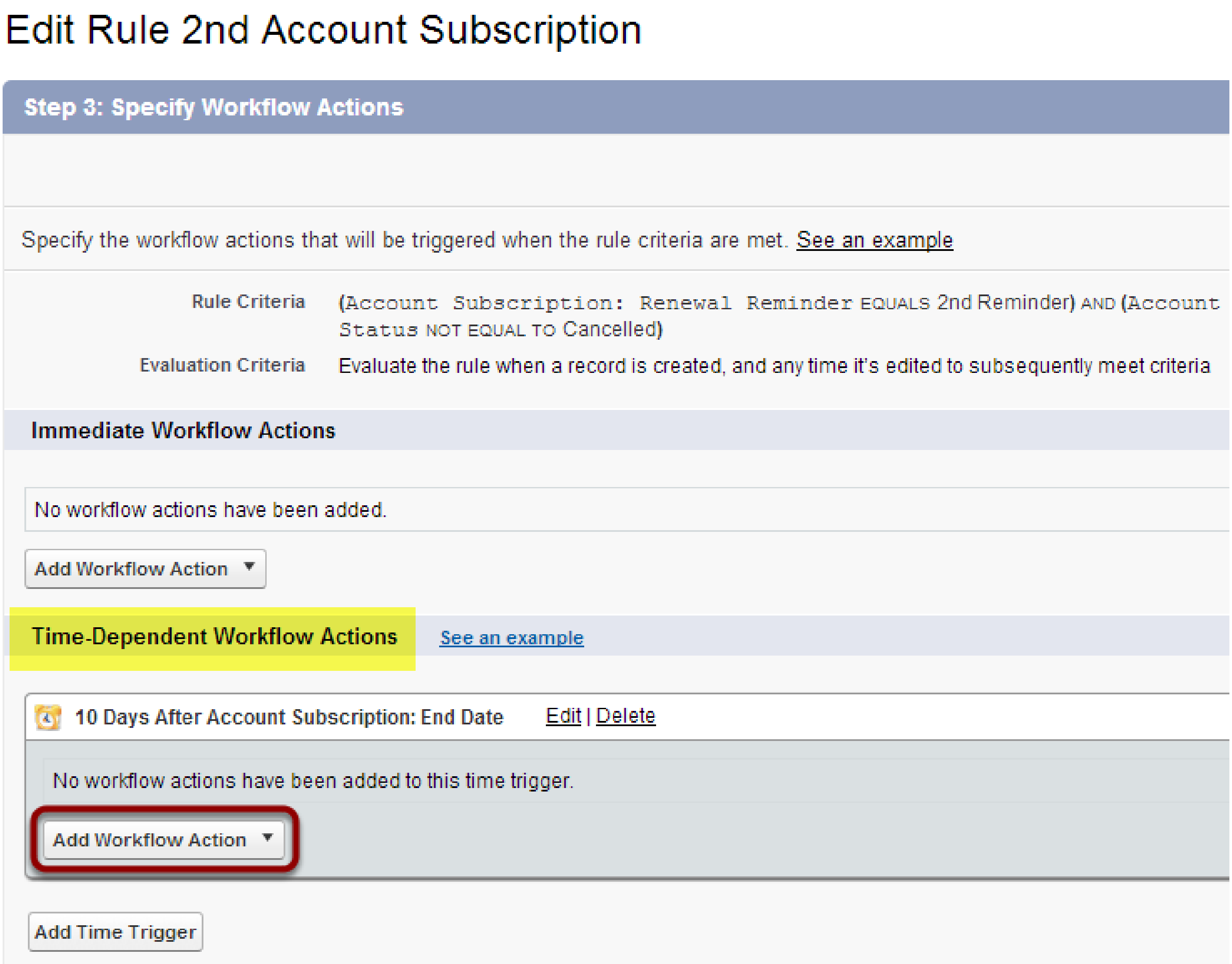


Set Time Trigger to '10 days after Subscription End Date' and Save

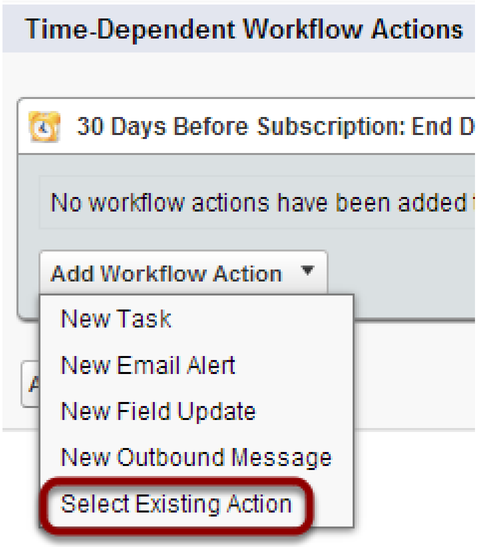


Note: You can change the number of days as required if you wish to give more/less notice.

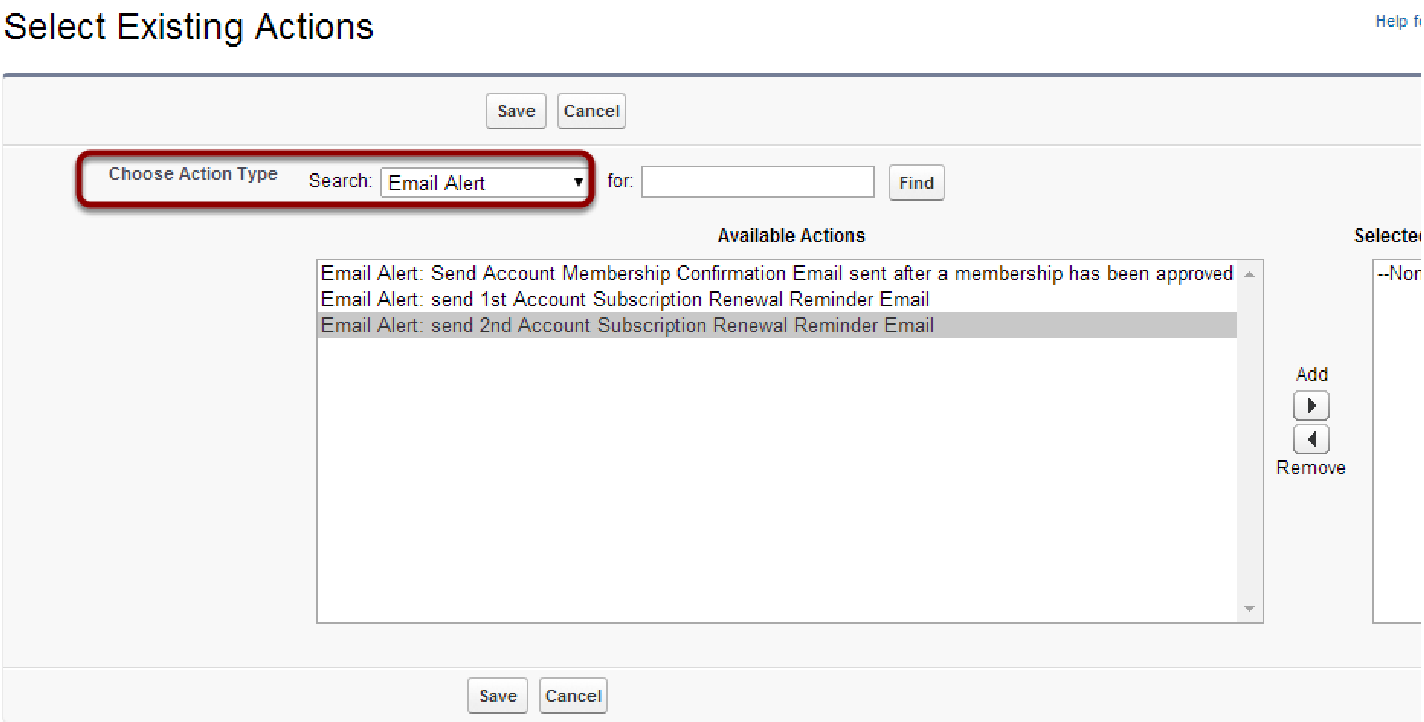
Select the 'Add Workflow Action' button in the Time Dependent Workflow Action section.



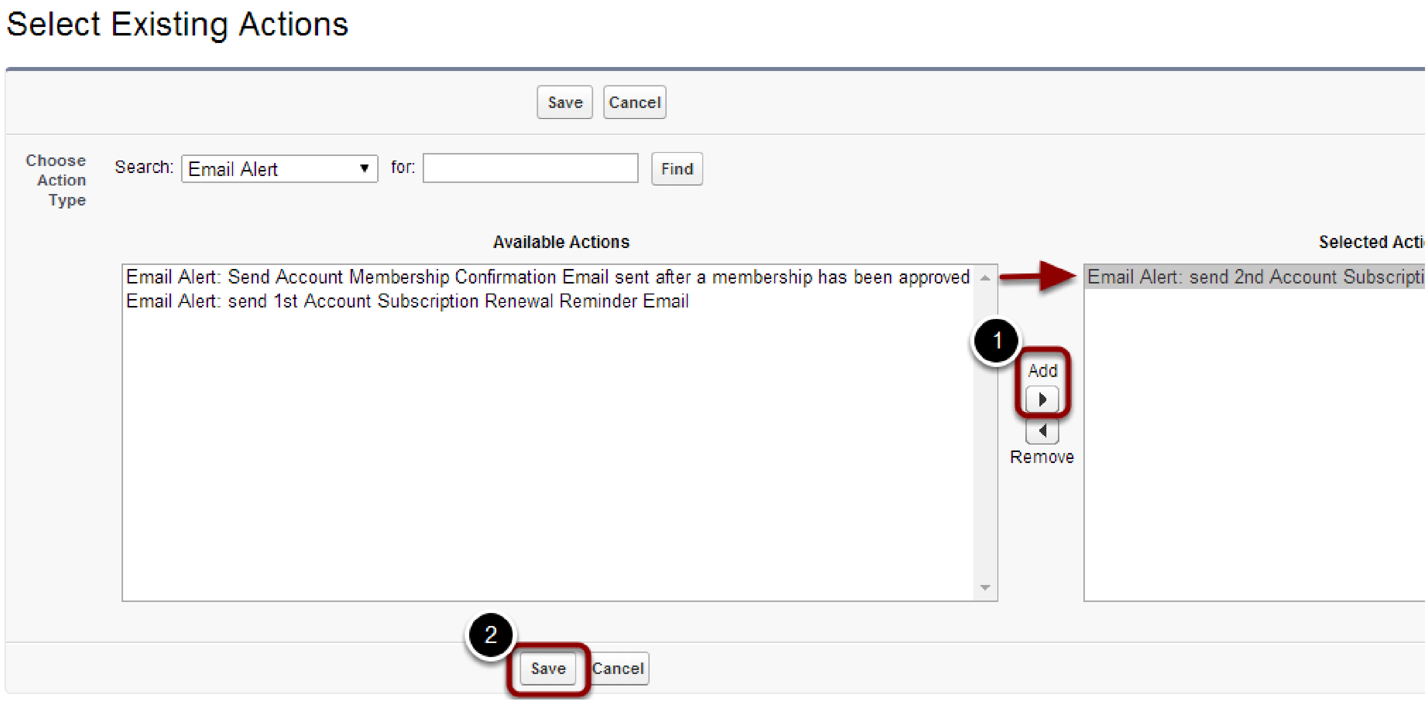
Select 'Select Existing Action from the drop down menu



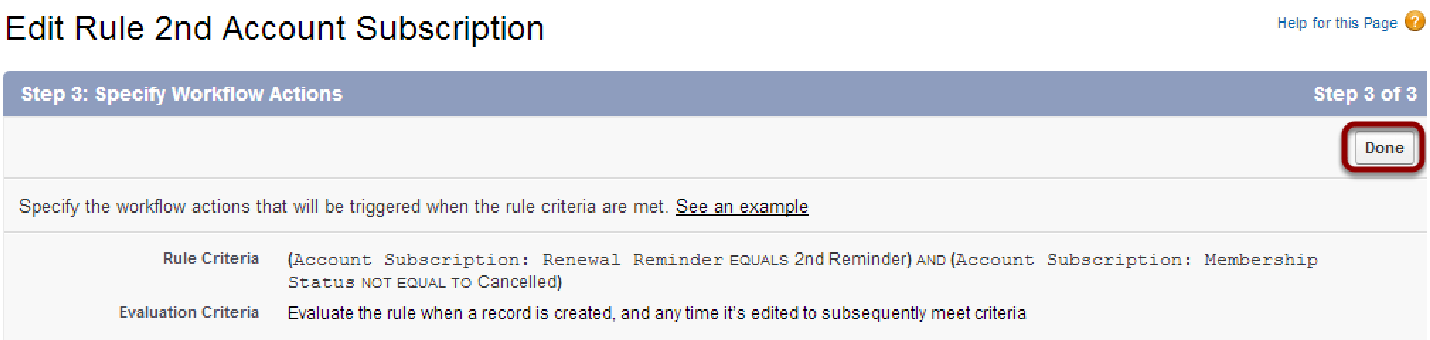
Select 'Email Alert' from the Choose Action Type drop down menu



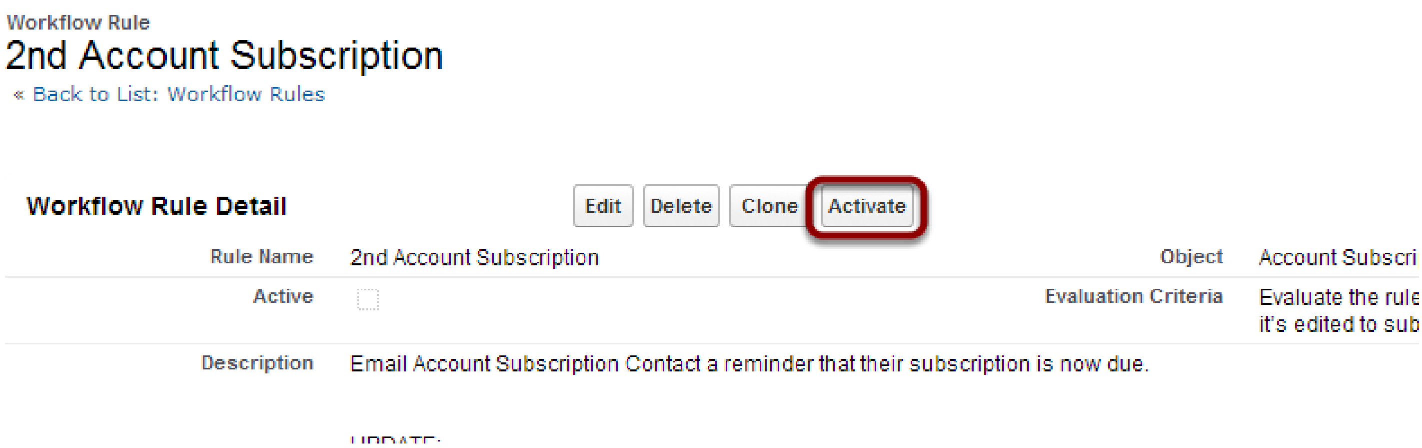
Add 'Email Alert: send 2nd Renewal Reminder Email' and Save



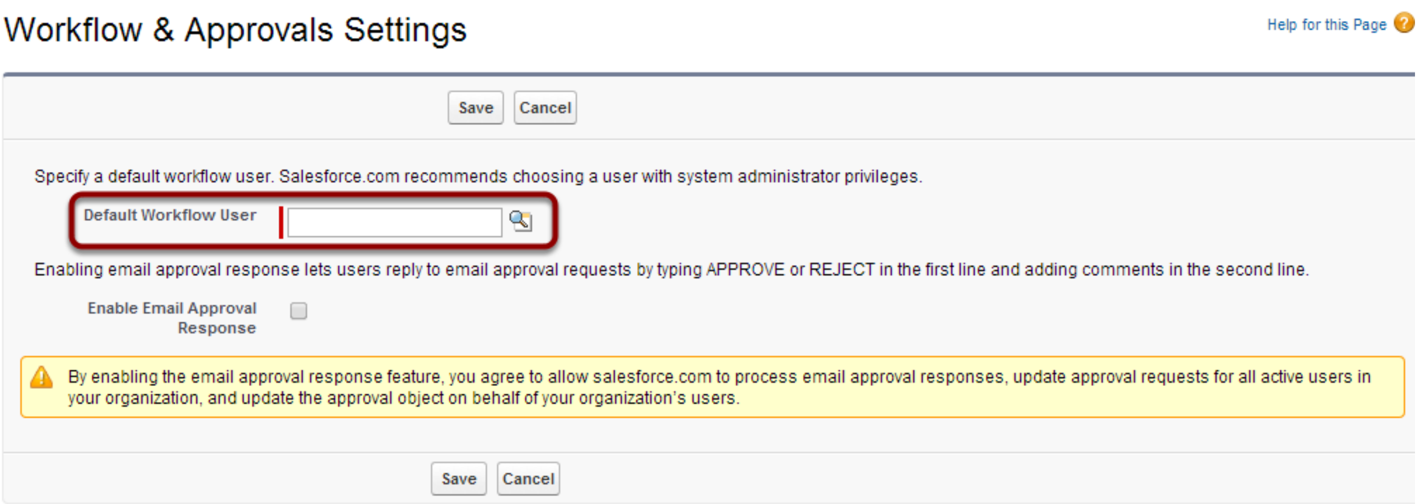
Select 'Done' button to complete the workflow rule



Select 'Activate' to begin the workflow process

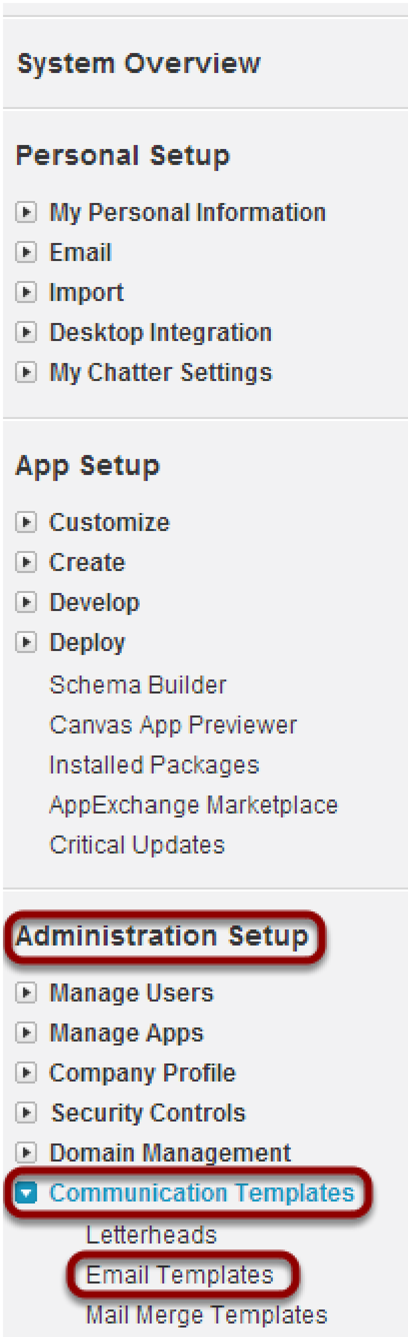


Set 'Default Workflow User' and Save

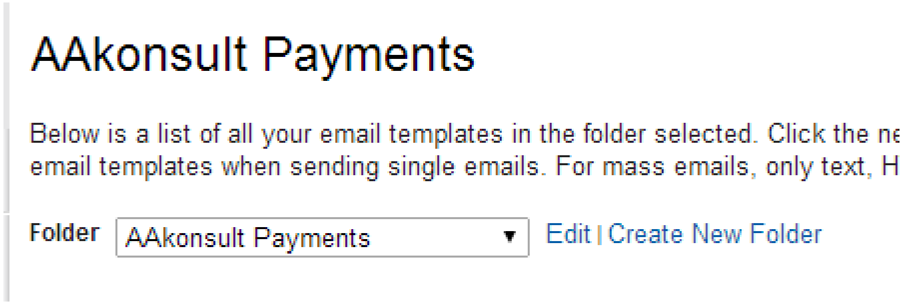


If a Default Workflow User has already been set, this step will be skipped.

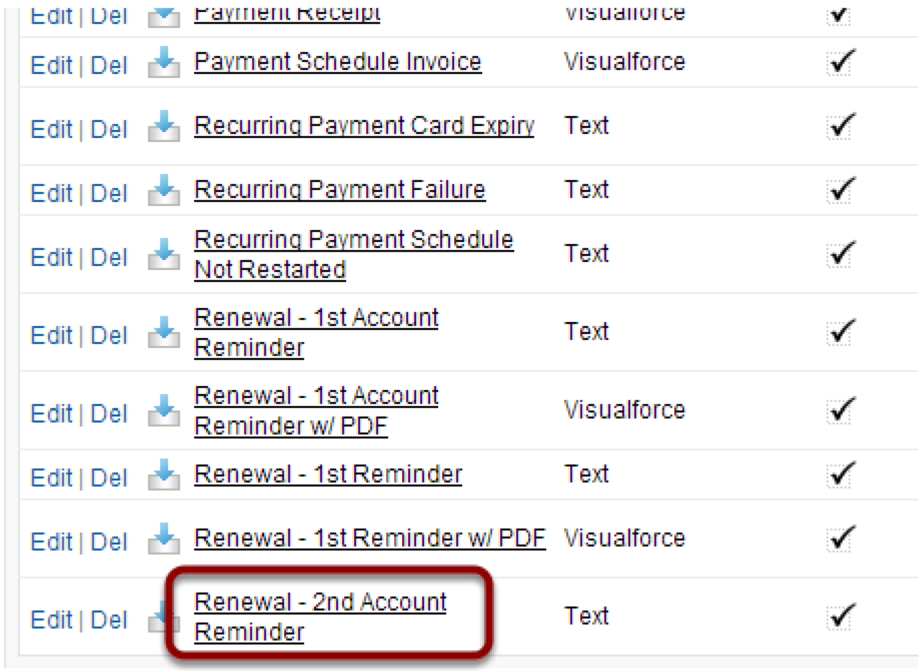
Review email template for 2nd Reminder [Setup > Administration Setup> Communication Templates > Email Templates]



Select AAkonsult Payments from the drop down Folder list



Scroll down to find 'Renewal - 2nd Account Reminder'



A template with a PDF attachment is also available.

Edit and test your template

Text Email Template

Renewal - 2nd Account Reminder (Managed)

« Back to List: Workflow Rules

Preview your email template below.

This Email Template is managed, meaning that you may only edit certain attributes. Display More Information

Email Template Detail Edit Delete Clone

Folder	AAkonsult Payments		
Email Template Name	Renewal - 2nd Account Reminder	Available For Use	✓
Template Unique Name	Renewal_2nd_Account_Reminder	Last Used Date	
Namespace Prefix	AAkPay	Times Used	
Installed Package	AAkPayments		
Encoding	General US & Western Europe (ISO-8859-1, ISO-LATIN-1)		
Author	Jeff Challis [Change]		
Description	Renewal - 2nd Account Subscription Reminder, sent automatically by workflow		
Created By	Jeff Challis, 3/10/2013 6:00 PM	Modified By	Jeff C

Edit Delete Clone

Email Template Send Test and Verify Merge Fields

Subject Membership Renewal

Plain Text Preview

Dear {!NullValue(Contact.FirstName,"Supporter")},

This is a reminder to that your membership is due to expire on the {!AAkPay__Account_Subscription__c.AAkPay__End_Date__c}.

Renewing your membership is easy, simply follow the following link:

How to activate the Membership Confirmation workflow

This workflow triggers the sending of a Subscriber/Membership Confirmation letter. This is used by organisations that have a membership approval process and after the new member has been approved, they then send out a confirmation letter.

The same process can be applied to organisational subscriptions. Activate 'Account Membership Confirmation' instead.

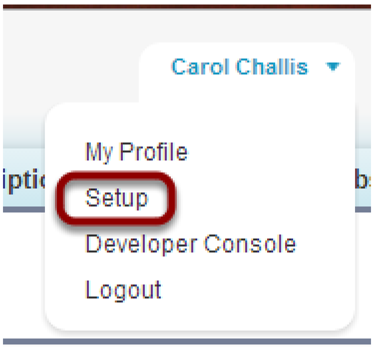
Quick Steps - Contact Level memberships

1. Activate workflow: Membership Confirmation
2. Optionally, review the Email Template associated with the confirmation email

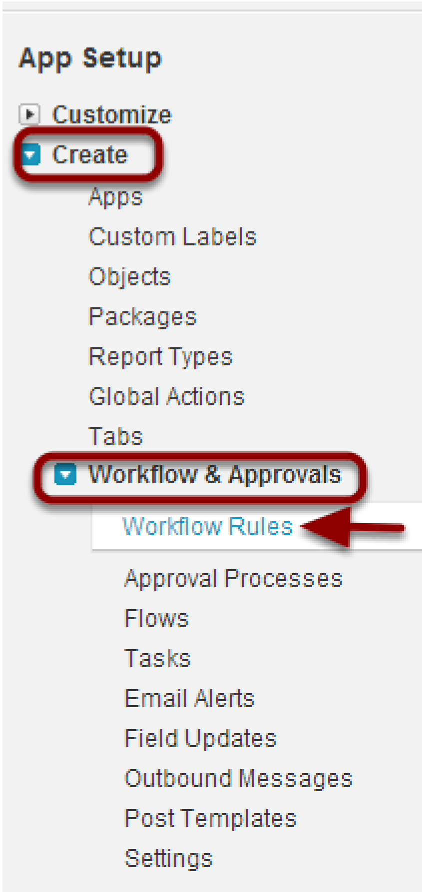
Quick Steps - Account Level memberships

1. Activate workflow: Account Membership Confirmation
2. Optionally, review the Email Template associated with the confirmation email

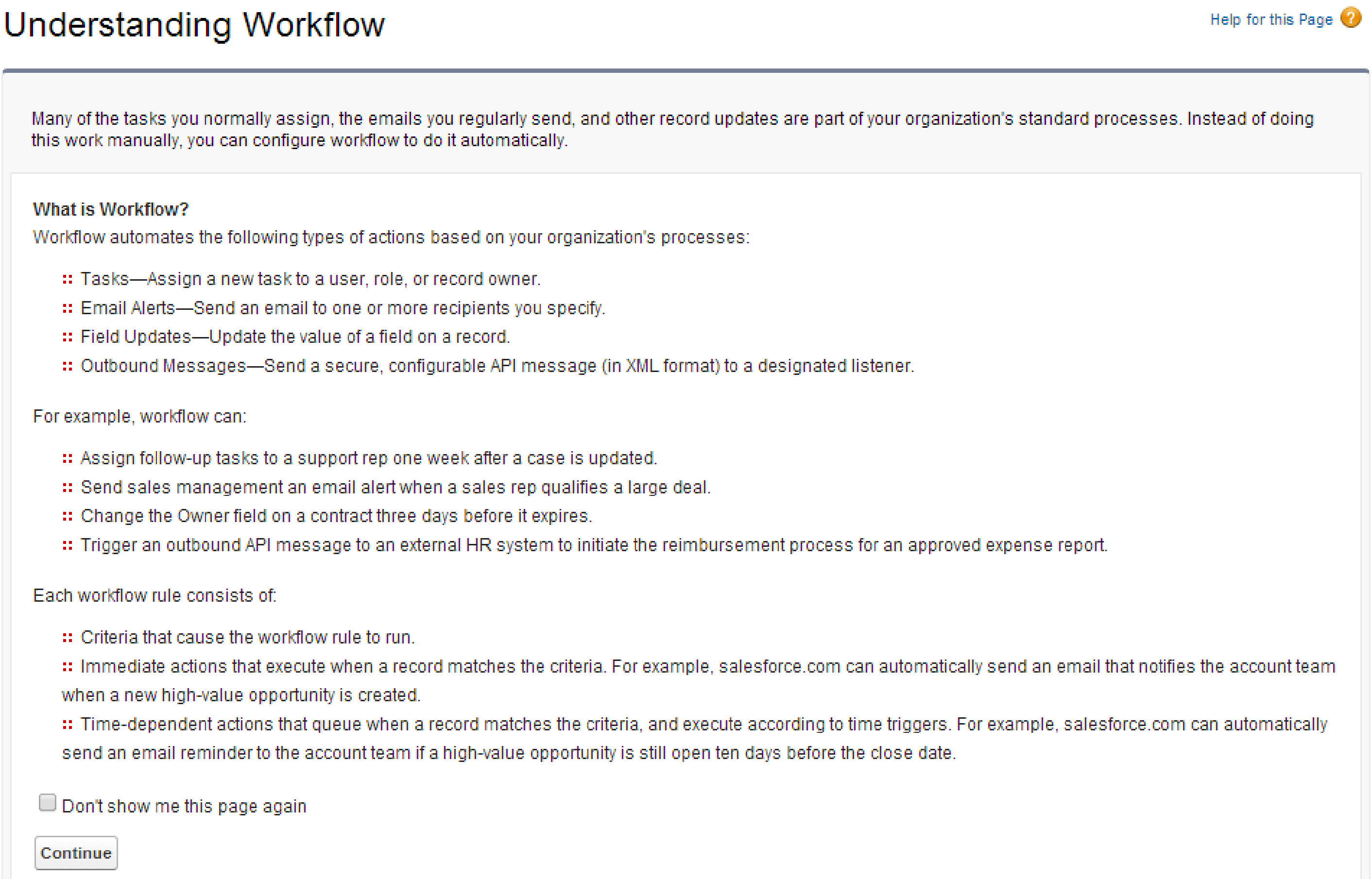
1. Navigate to Setup > App Setup > Create > Workflow & Approvals > Workflow Rules



2. Select 'Workflow Rules'



3. Read about Workflows and select 'Continue'



Understanding Workflow

Help for this Page

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For example, workflow can:

:: Assign follow-up tasks to a support rep one week after a case is updated.
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Each workflow rule consists of:

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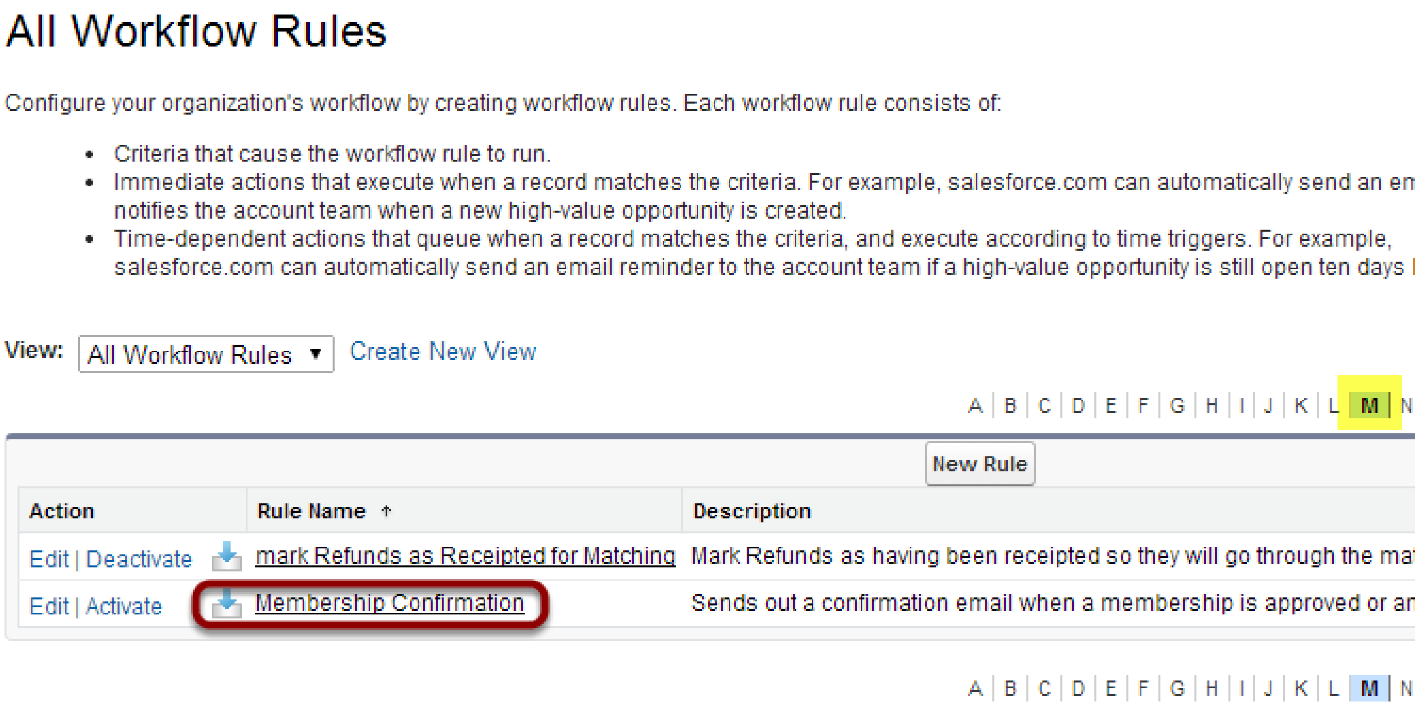
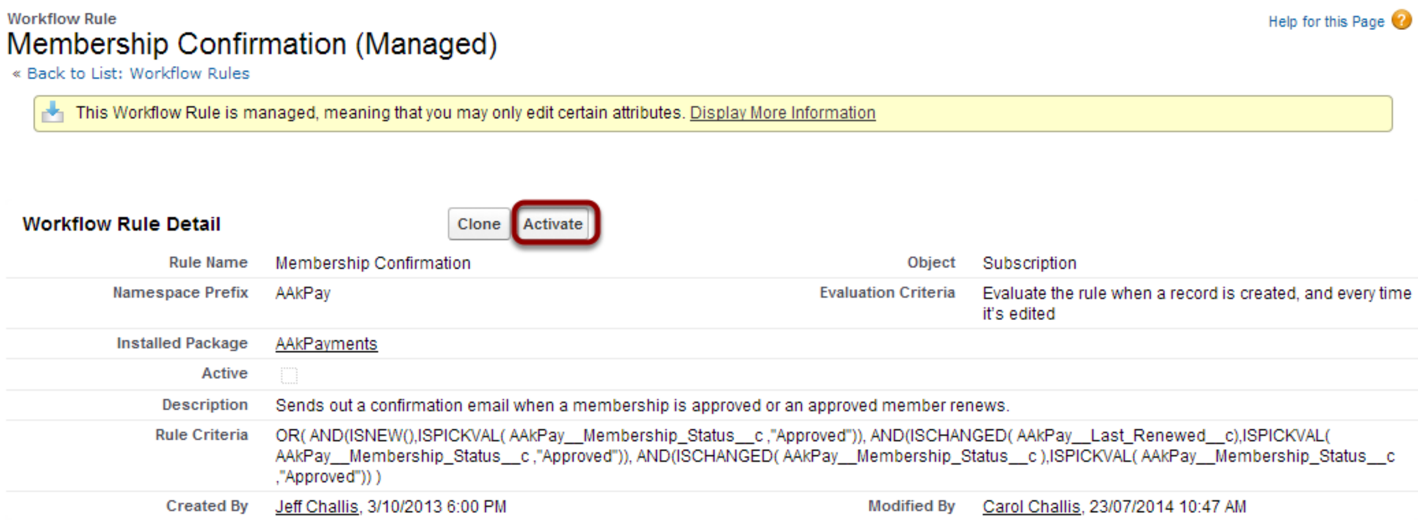
Continue

This page can be turned off.

4. Use the alphabetical look-up to find 'Membership Confirmation'



5. Select 'Activate'



How to set up recurring payments

Please note, this workflow is ONLY required if you wish to use the Variable Recurring Payments process and want to have the recurring payments processed automatically after they transactions are generated.

This workflow is generally superseded by using the Regular Recurring Payment option (as defined on the Payment Form related to the Merchant Facility Tab). This is the default option for all new installations of AAkonsult Payments.

Salesforce already comes with workflow templates that cannot be altered. These instructions show how to create a copy of the template which is then updated to suit AAkonsult Payment's functionality.

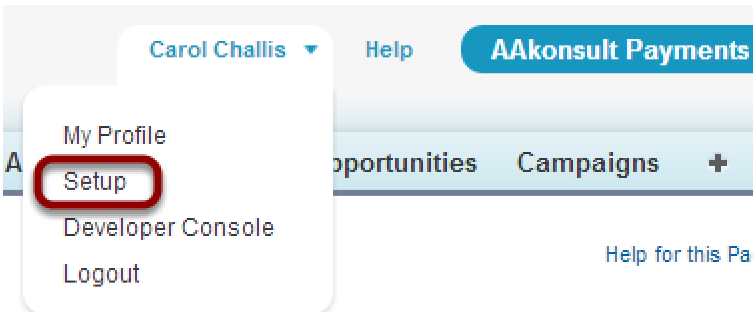
This workflow reminds administrators to restart the Recurring Payment Processor, such someone stop the Recurring Payment Processor, but for some reason forgets to restart it within 1 day.

Salesforce already comes with workflow templates that cannot be altered. These instructions show how to create a copy of the template which is then updated to suit AAkonsult Payment's functionality.

Quick Steps:

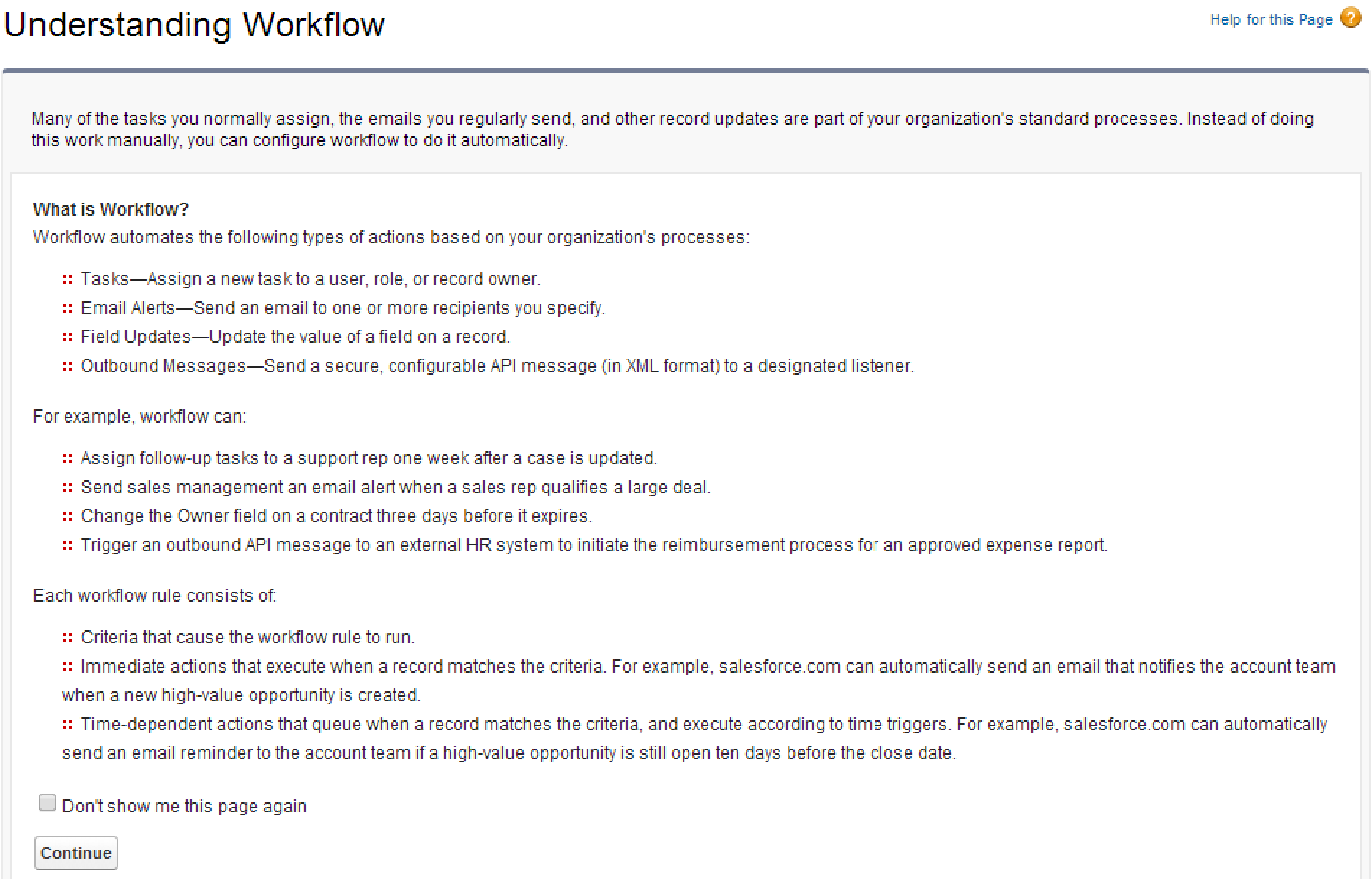
1. Clone Workflow rule "Payments - Recurring Process [ADD TIME BASED WORKFLOW]" and rename to "Payments - Recurring Process"
2. Add a Time-Dependant Action. Set it to fire 1 hour after Rule Trigger date.
3. Add Action - Use existing workflow - "Field Update: set Status Payment Start"

1. Navigate to Setup > App Setup > Create > Workflow & Approvals > Workflow Rules



1.1 Select 'Workflow Rules'

2. Read about Workflows and select 'Continue'



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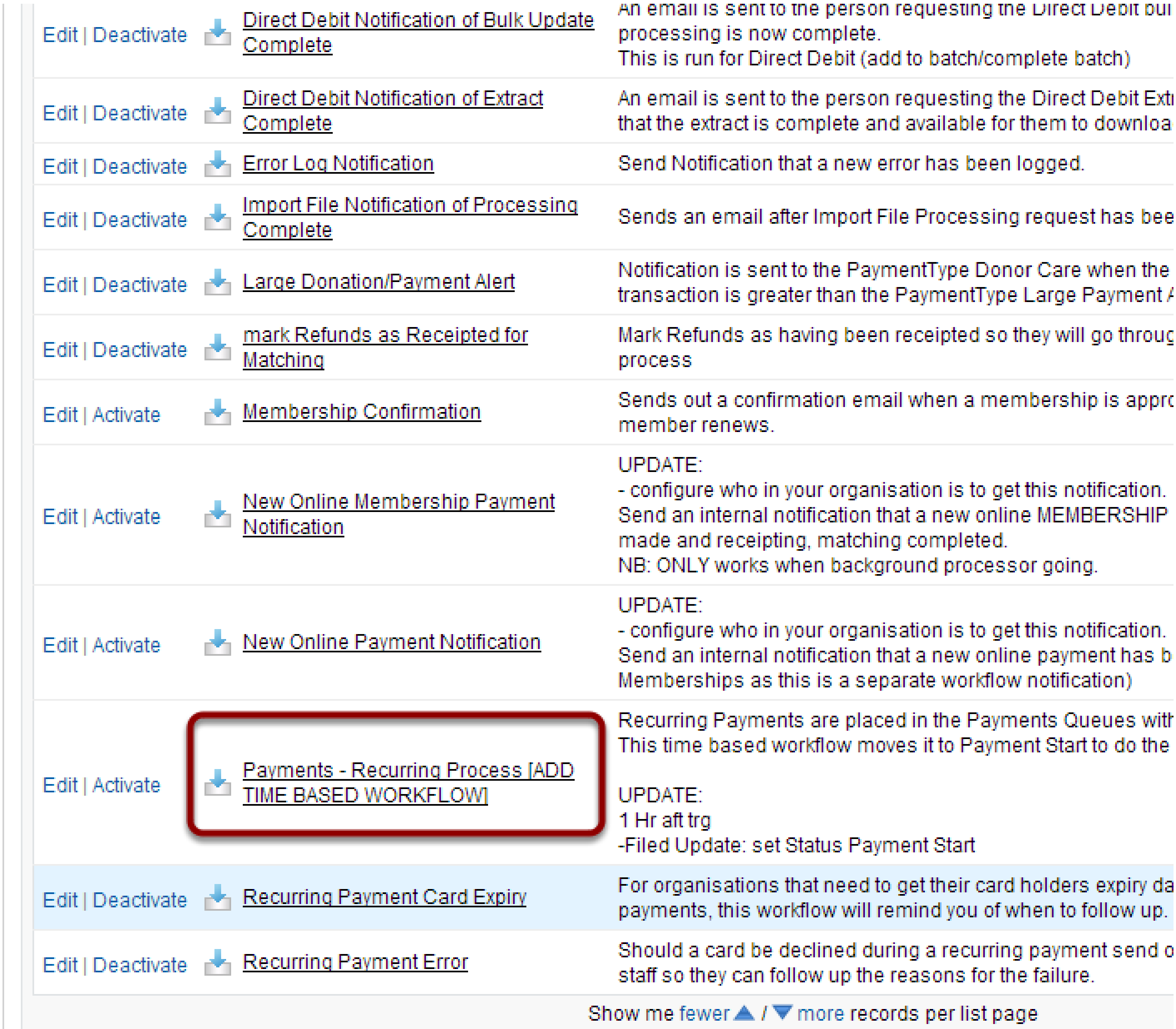
Continue

This page can be turned off.

3. Scroll down to find 'Payments - Recurring Process [ADD TIME BASED WORKFLOW]' and select

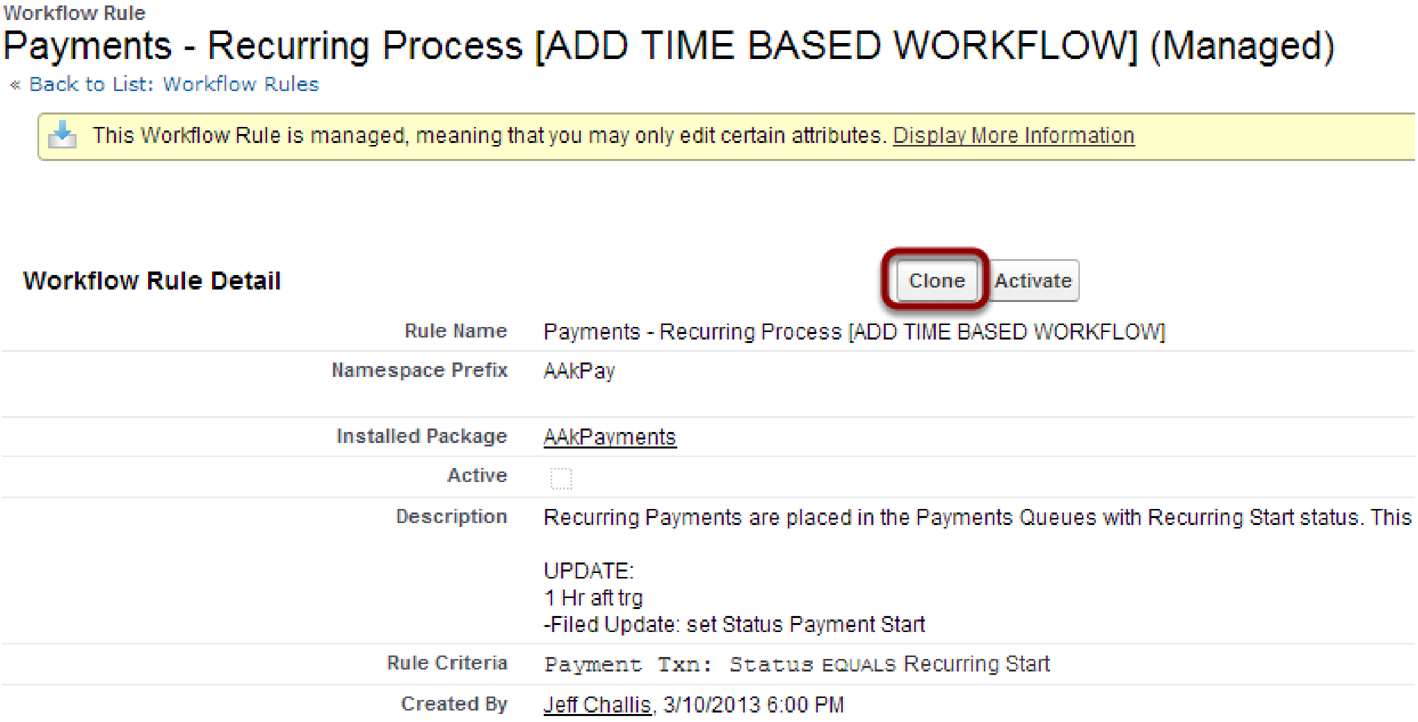


Edit | Deactivate	Direct Debit Notification of Bulk Update Complete	An email is sent to the person requesting the Direct Debit bul processing is now complete. This is run for Direct Debit (add to batch/complete batch)
Edit | Deactivate	Direct Debit Notification of Extract Complete	An email is sent to the person requesting the Direct Debit Ext that the extract is complete and available for them to downloa
Edit | Deactivate	Error Log Notification	Send Notification that a new error has been logged.
Edit | Deactivate	Import File Notification of Processing Complete	Sends an email after Import File Processing request has bee
Edit | Deactivate	Large Donation/Payment Alert	Notification is sent to the PaymentType Donor Care when the transaction is greater than the PaymentType Large Payment A
Edit | Deactivate	mark Refunds as Receipted for Matching	Mark Refunds as having been receipted so they will go throug process
Edit | Activate	Membership Confirmation	Sends out a confirmation email when a membership is appro member renews.
Edit | Activate	New Online Membership Payment Notification	UPDATE: - configure who in your organisation is to get this notification. Send an internal notification that a new online MEMBERSHIP made and receipting, matching completed. NB: ONLY works when background processor going.
Edit | Activate	New Online Payment Notification	UPDATE: - configure who in your organisation is to get this notification. Send an internal notification that a new online payment has b Memberships as this is a separate workflow notification)
Edit | Activate	Payments - Recurring Process [ADD TIME BASED WORKFLOW]	Recurring Payments are placed in the Payments Queues with This time based workflow moves it to Payment Start to do the UPDATE: 1 Hr aft trg -Filed Update: set Status Payment Start
Edit | Deactivate	Recurring Payment Card Expiry	For organisations that need to get their card holders expiry da payments, this workflow will remind you of when to follow up.
Edit | Deactivate	Recurring Payment Error	Should a card be declined during a recurring payment send o staff so they can follow up the reasons for the failure.

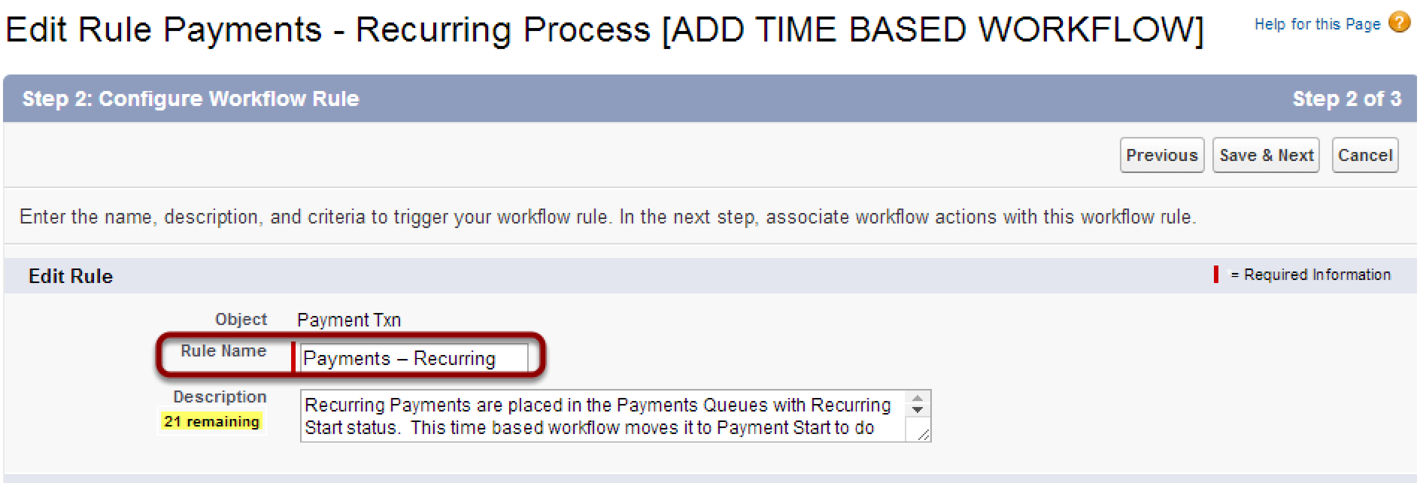
Show me fewer / more records per list page

Open the circled rule

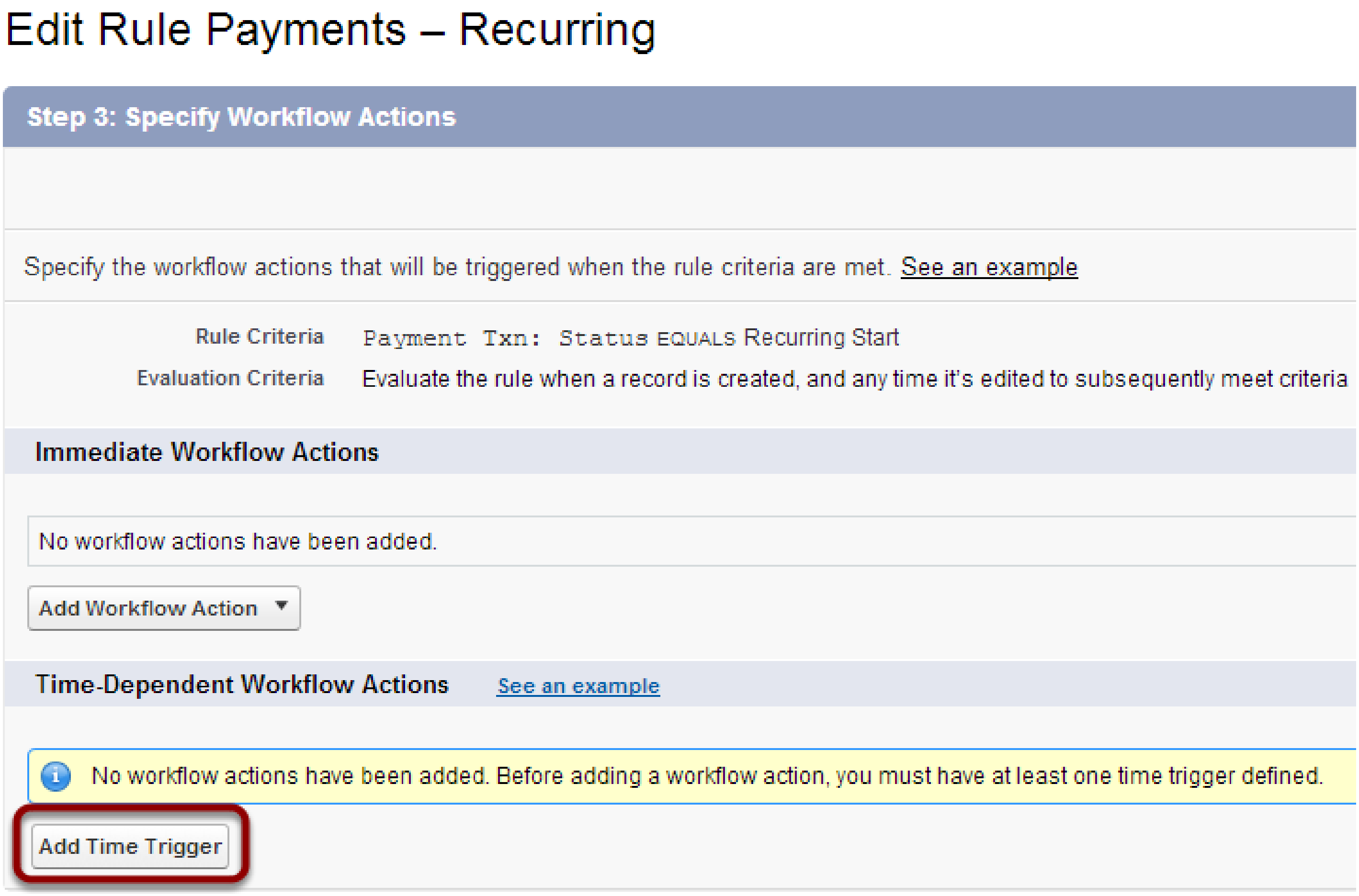
4. Select 'Clone'



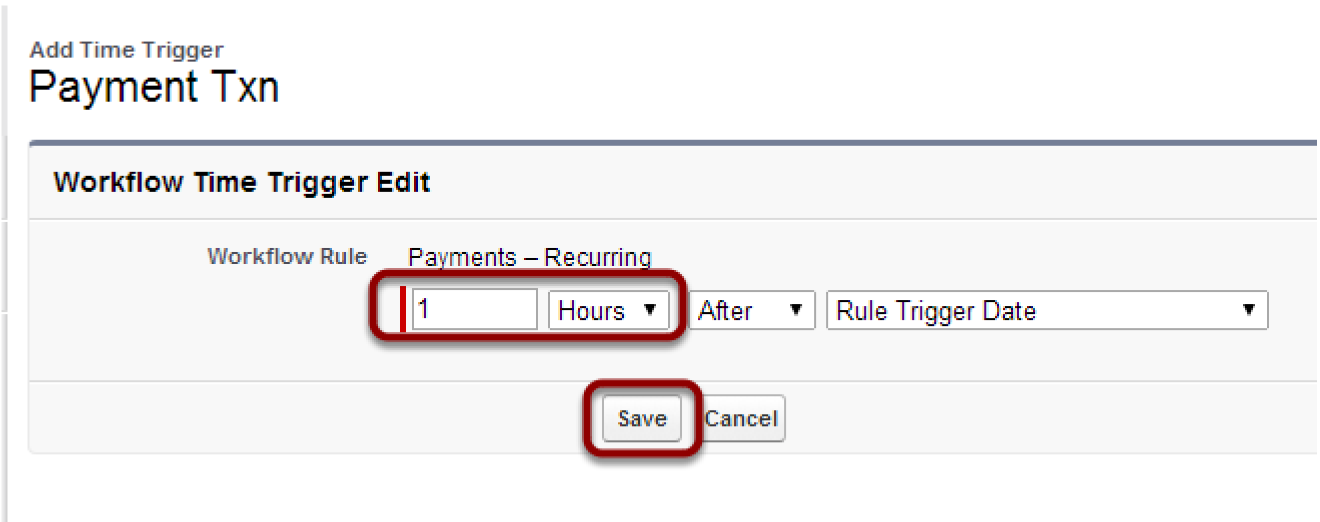
4.1 Re-name the workflow rule 'Payments - Recurring'



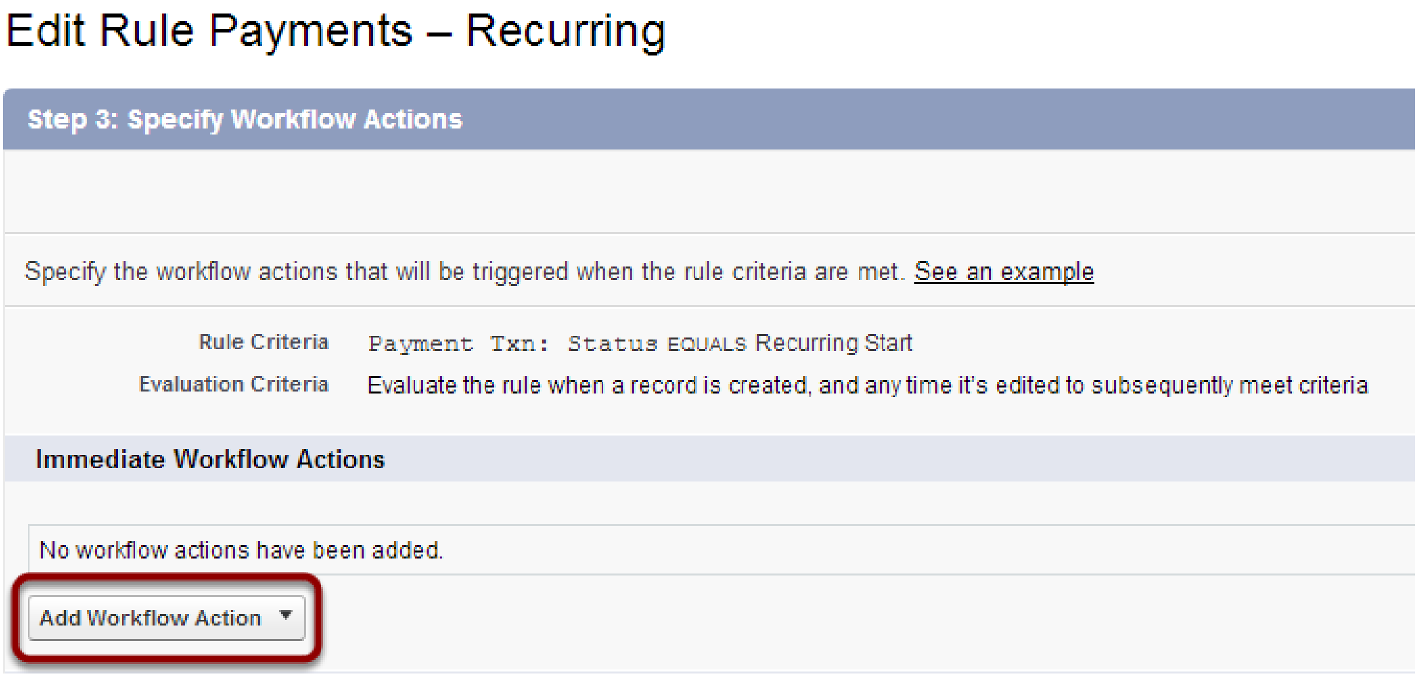
5. Select the 'Add Time Trigger' button



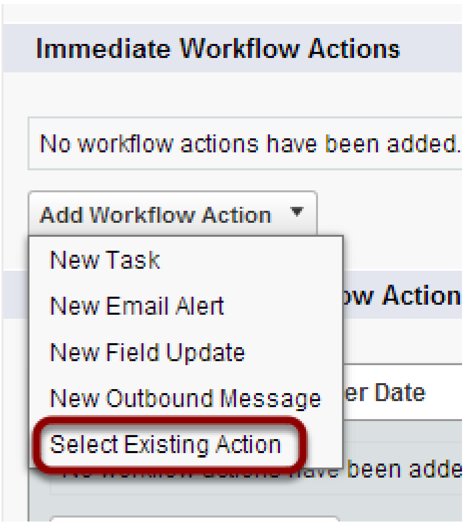
5.1 Set Time Trigger to '1 Hours After Rule Trigger Date' and Save



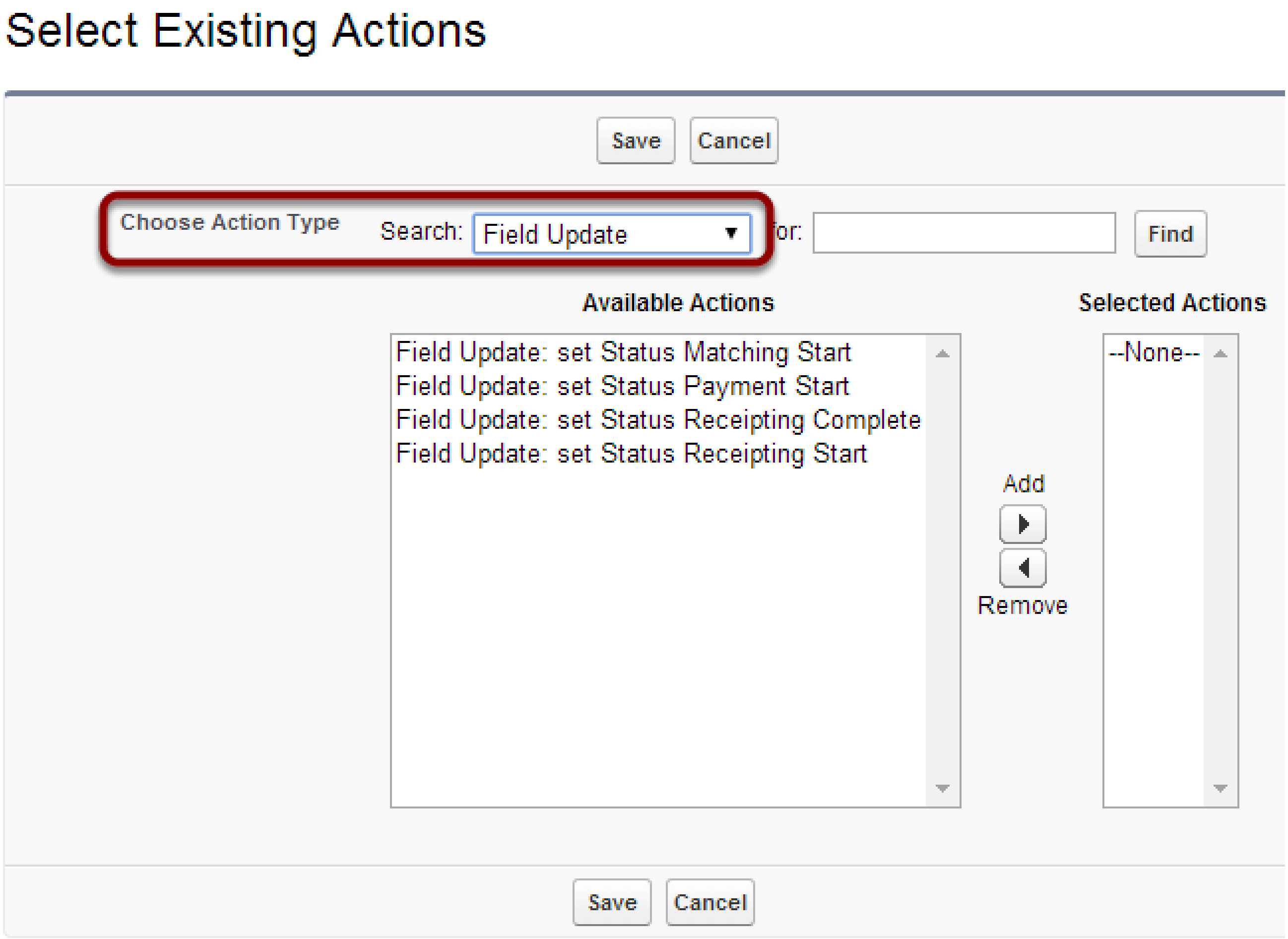
6. Select the 'Add Workflow Action' button



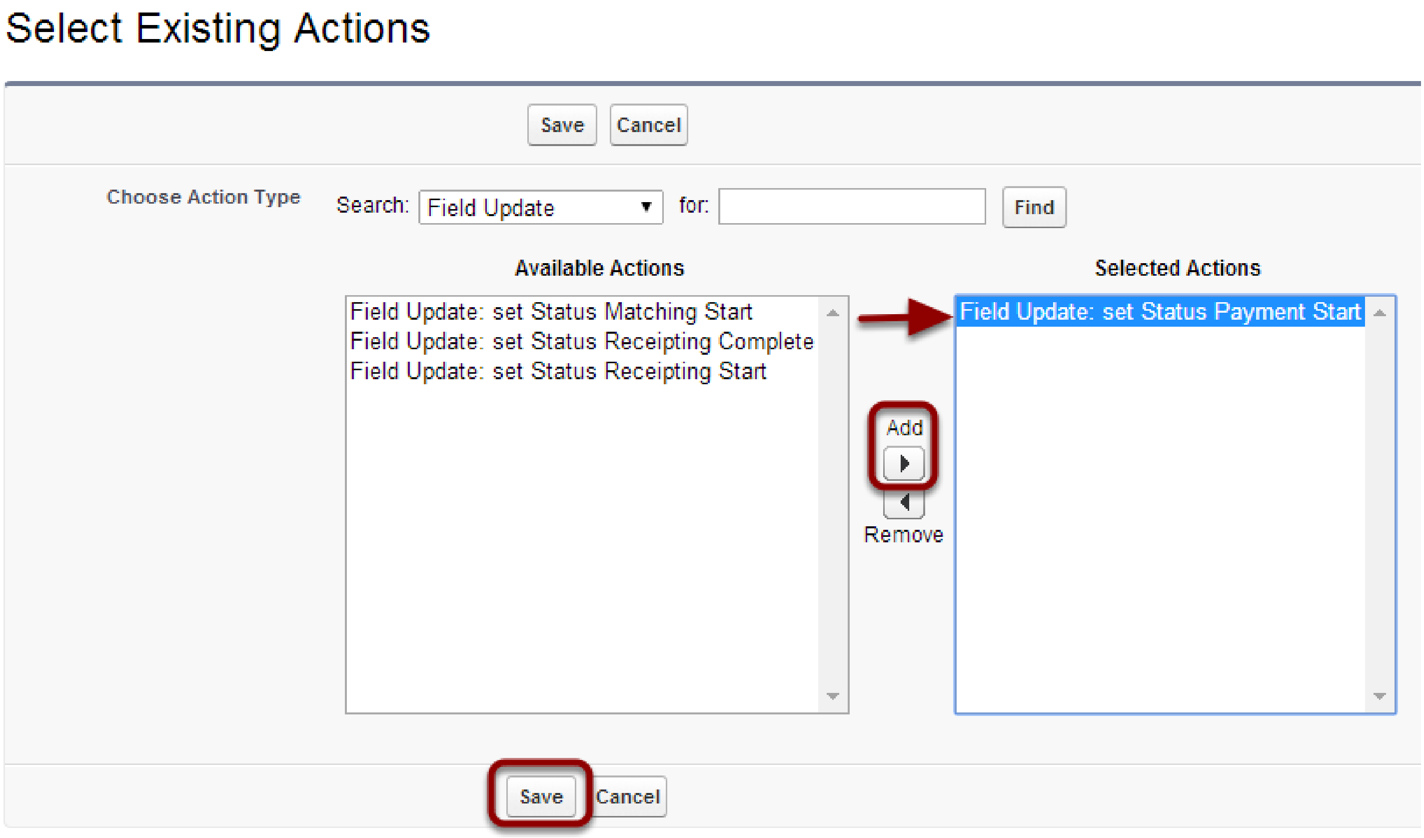
6.1 Select 'Select Existing Action from the drop down menu



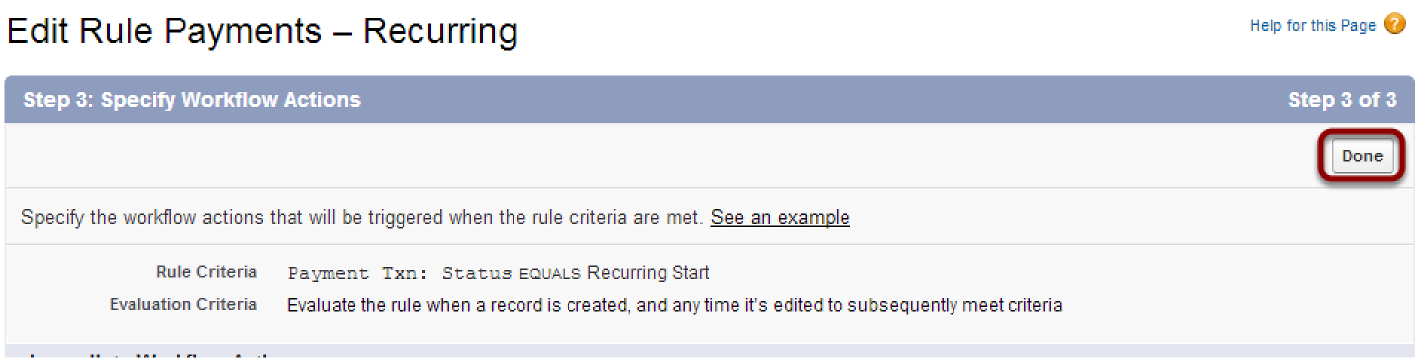
6.2 Select 'Field Update' from the Choose Action Type drop down menu



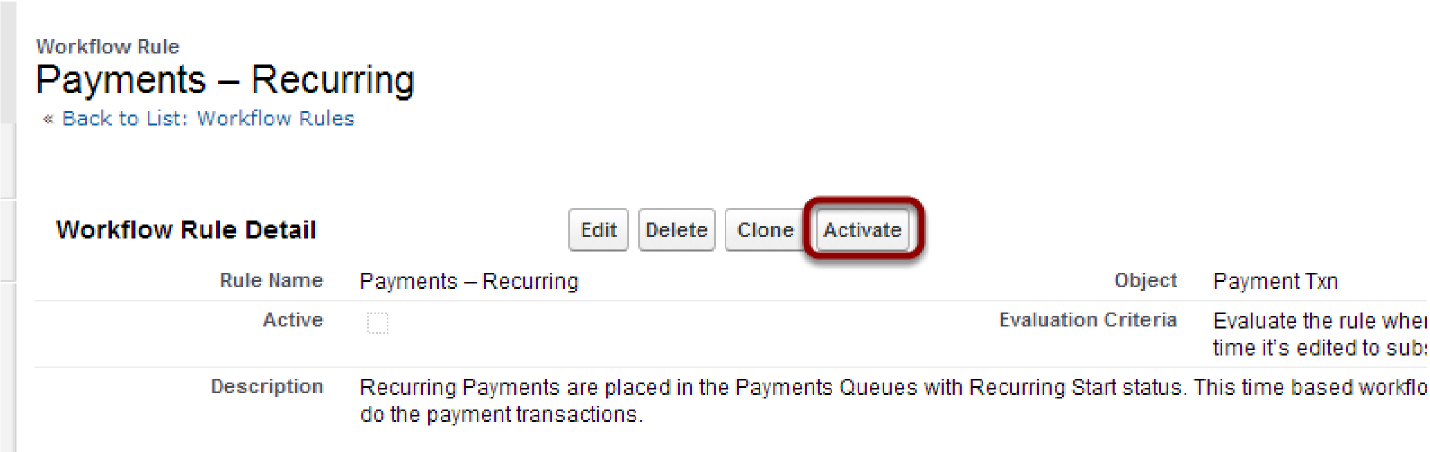
6.3 Add 'Field Update: set Status Payment Start' and Save



7. Select 'Done' button to complete the workflow rule



8. Select 'Activate' to begin the workflow process



How to send out Recurring Payments Card Expiry and Update Notifications

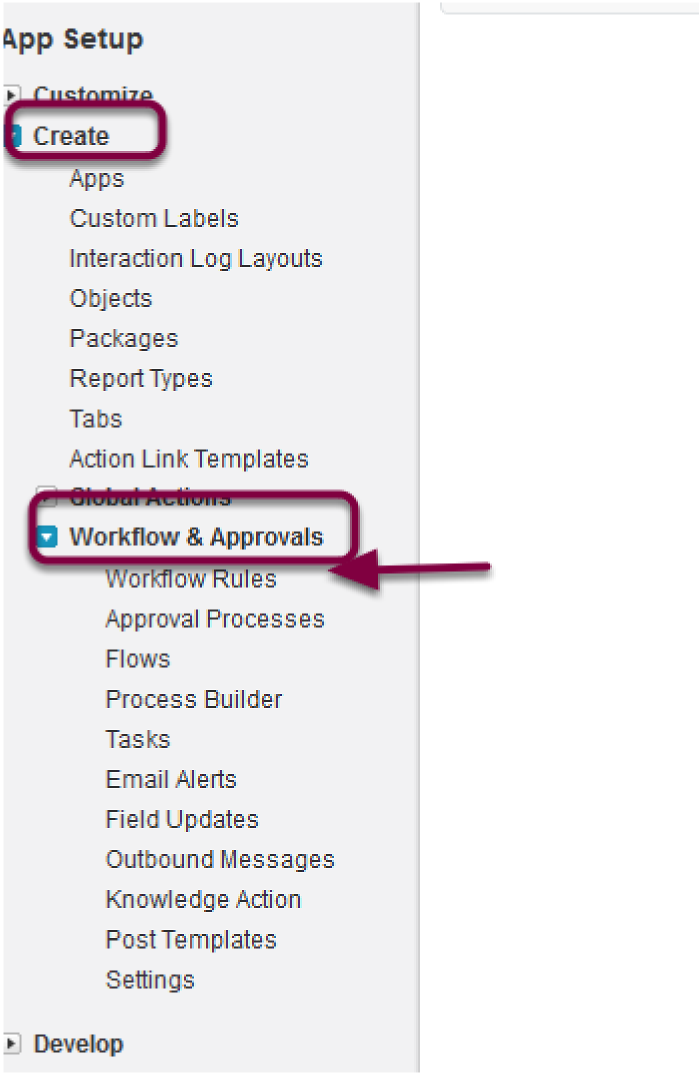
This workflow enables your organisation to automatically send out a notification to card holders when their Credit Card is about to Expiry. They can then update their own details online saving you the need to individually contact card holders.

Quick Steps:

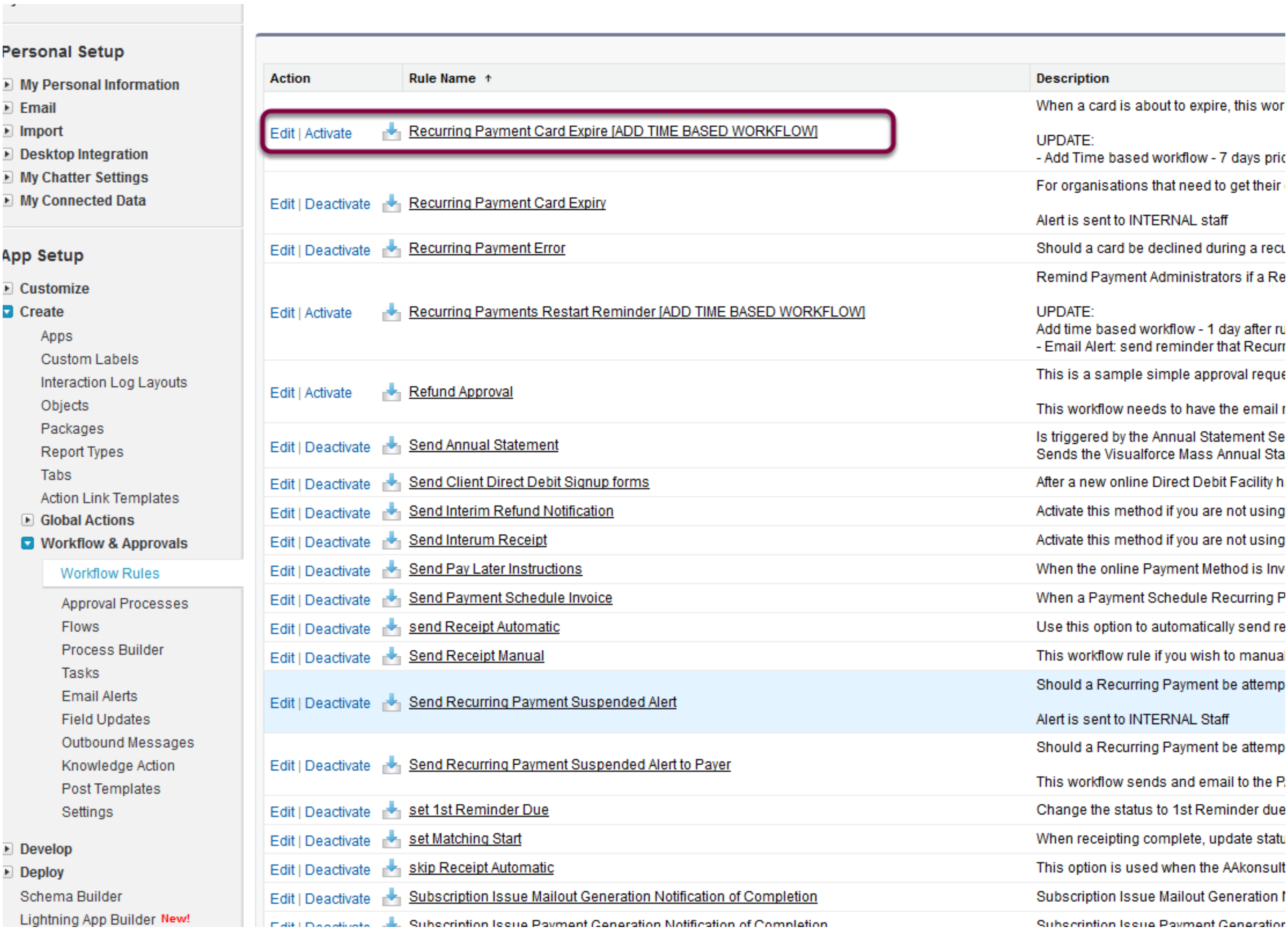
- Clone Workflow rule “Recurring Payment Card Expire [ADD TIME BASED WORKFLOW]" and rename to “Recurring Payment Card Expire”
- Add a Time-Dependant Action. Set it to fire 1 hour after Rule Trigger date.
- Add Action – Use existing workflow – “Field Update: set Status Payment Start”

1. Navigate to Setup > App Setup > Create > Workflow & Approvals > Workflow Rules

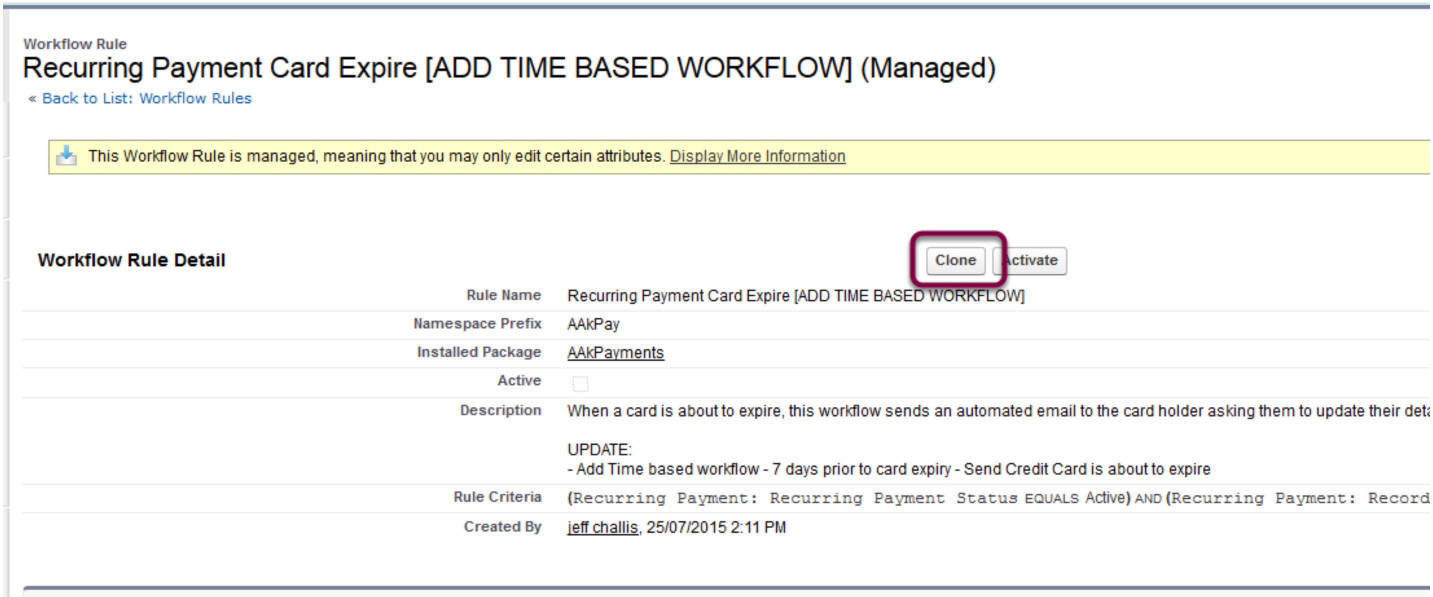
1.1 Select 'Workflow Rules'



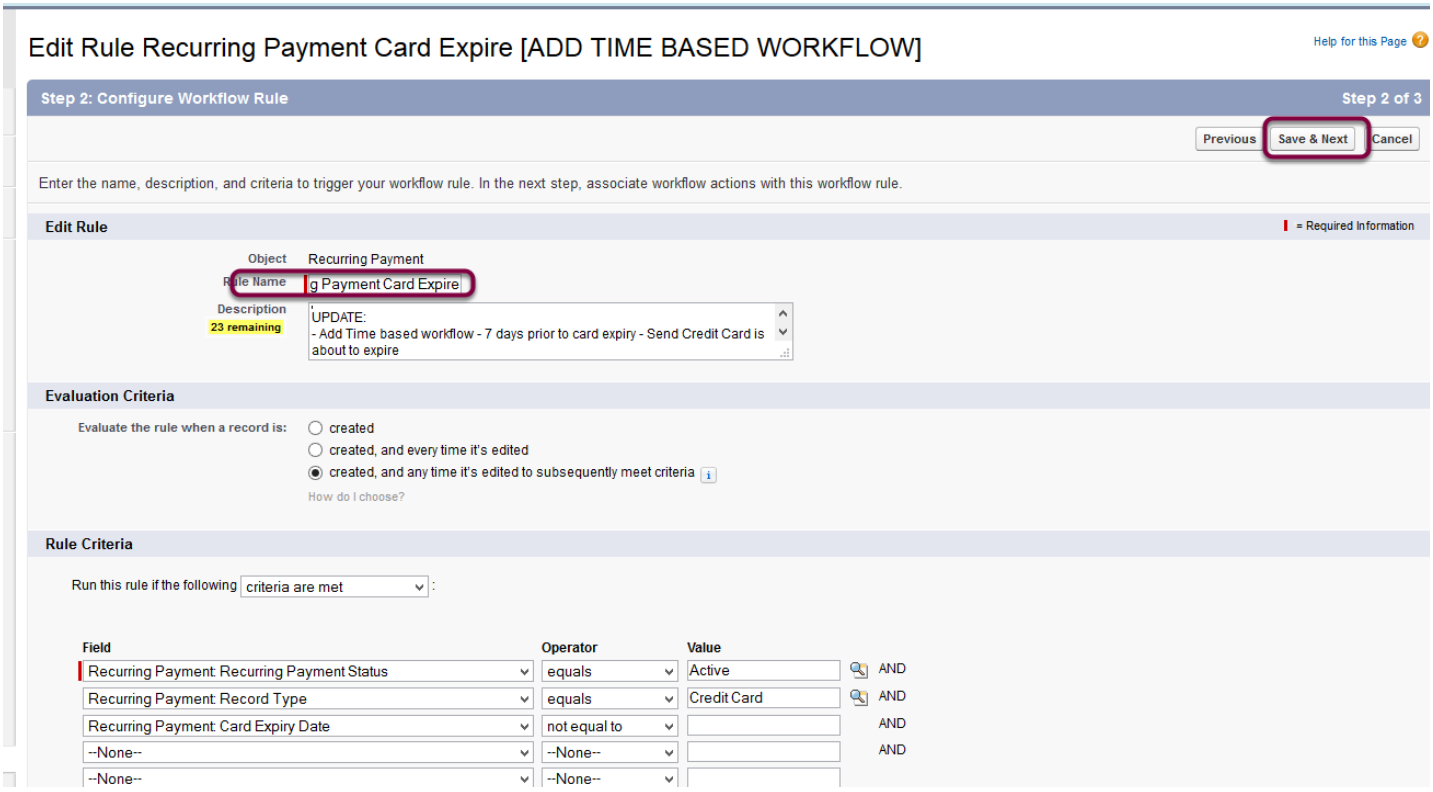
2. Scroll down to find ‘Recurring Payment Card Expire [ADD TIME BASED WORKFLOW]’ and select



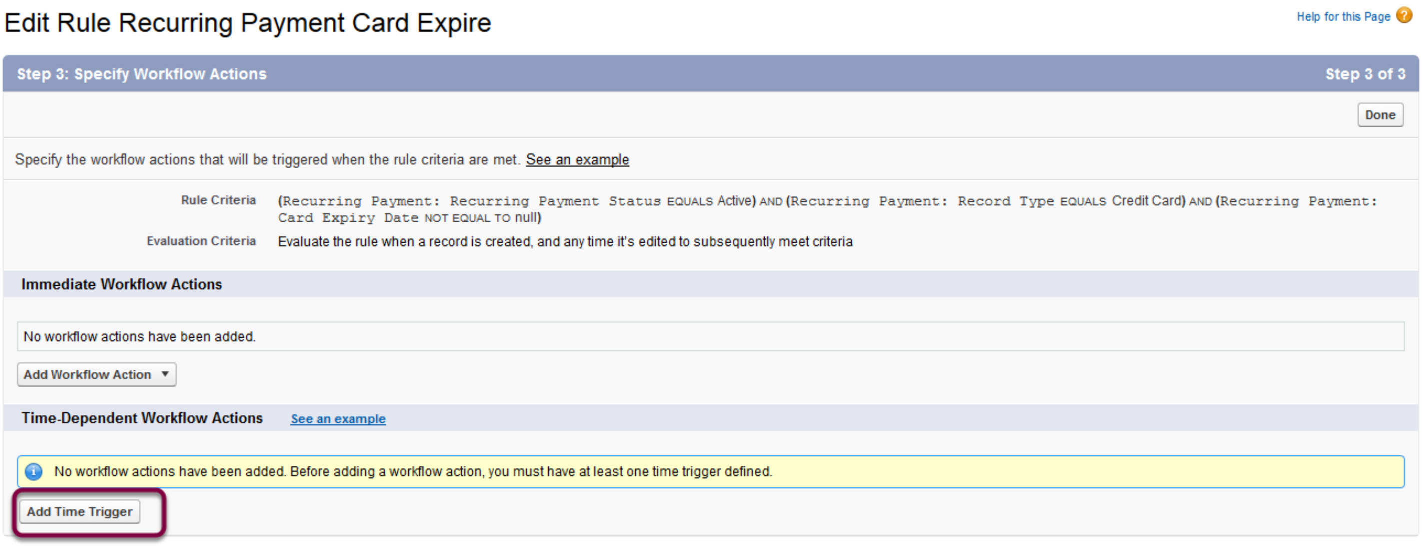
2.1 Select 'Clone'



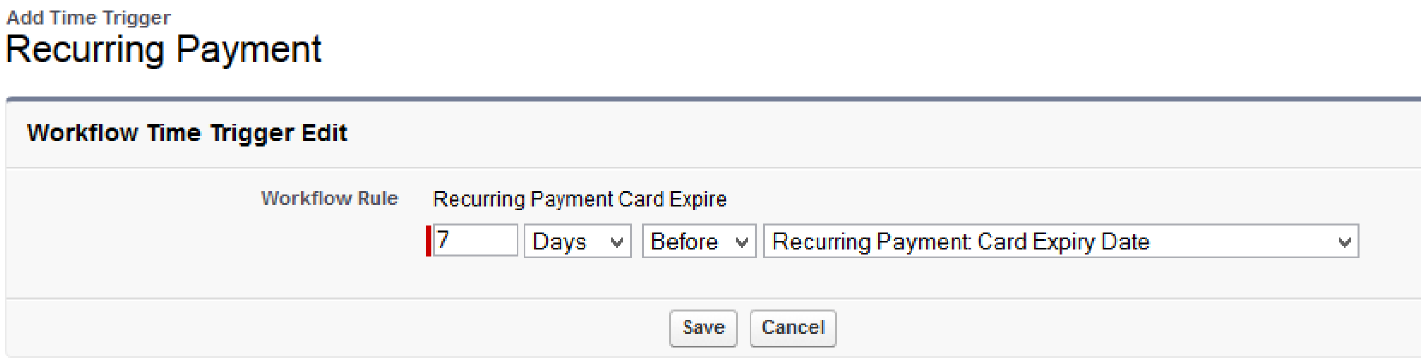
2.2 Re-name the workflow rule 'Recurring Payment Card Expire'



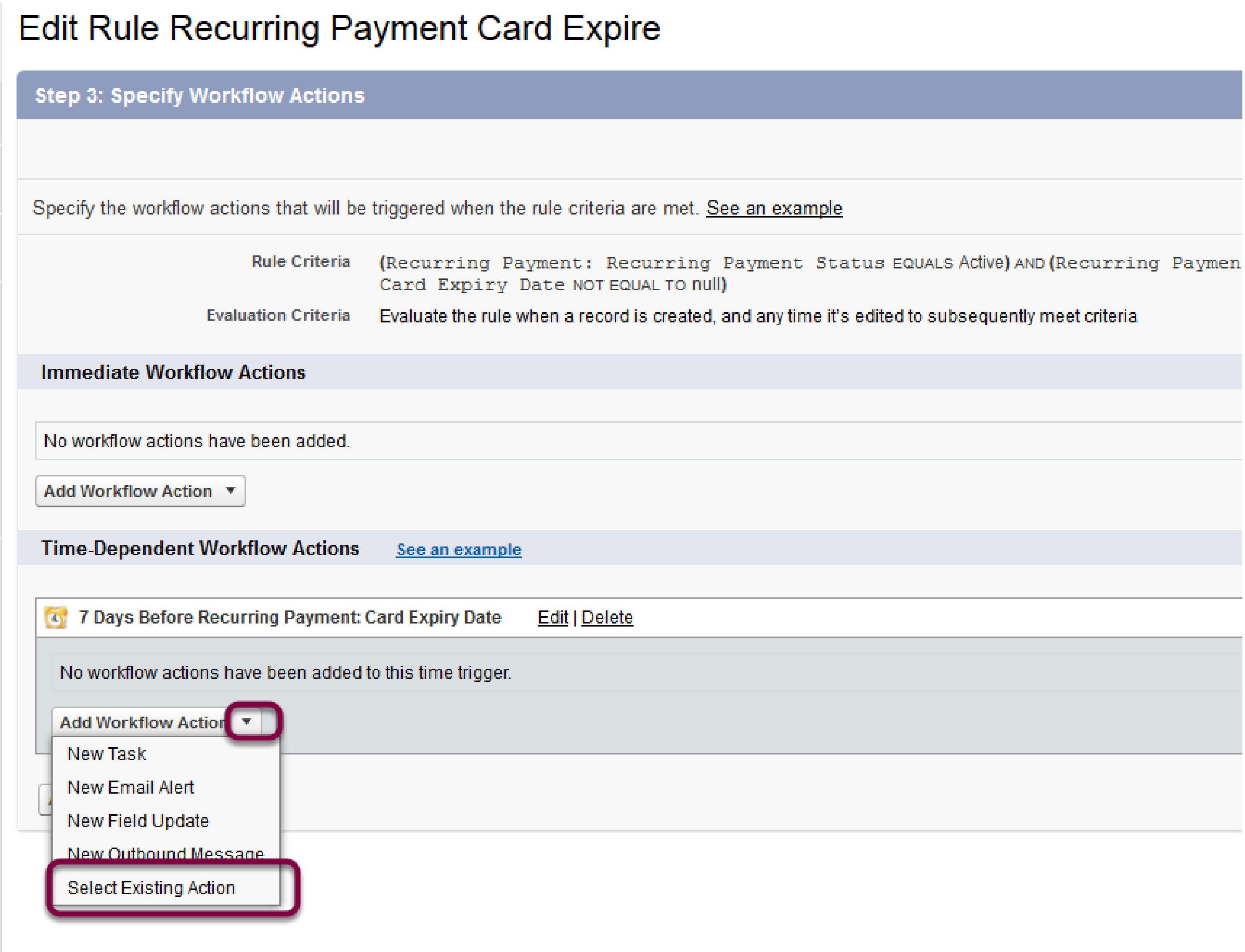
3. Select the 'Add Time Trigger' button



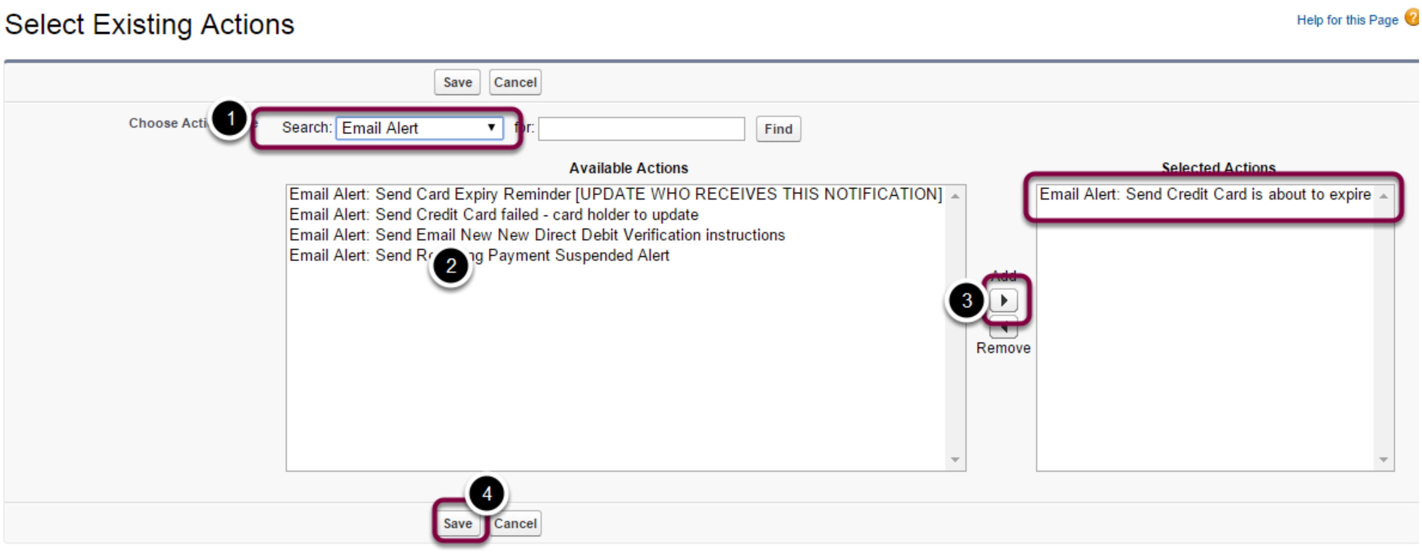
3.1 Set Time Trigger to '7 Days before Card Expiry Date' and Save



3.2 Select the 'Add Workflow Action' button

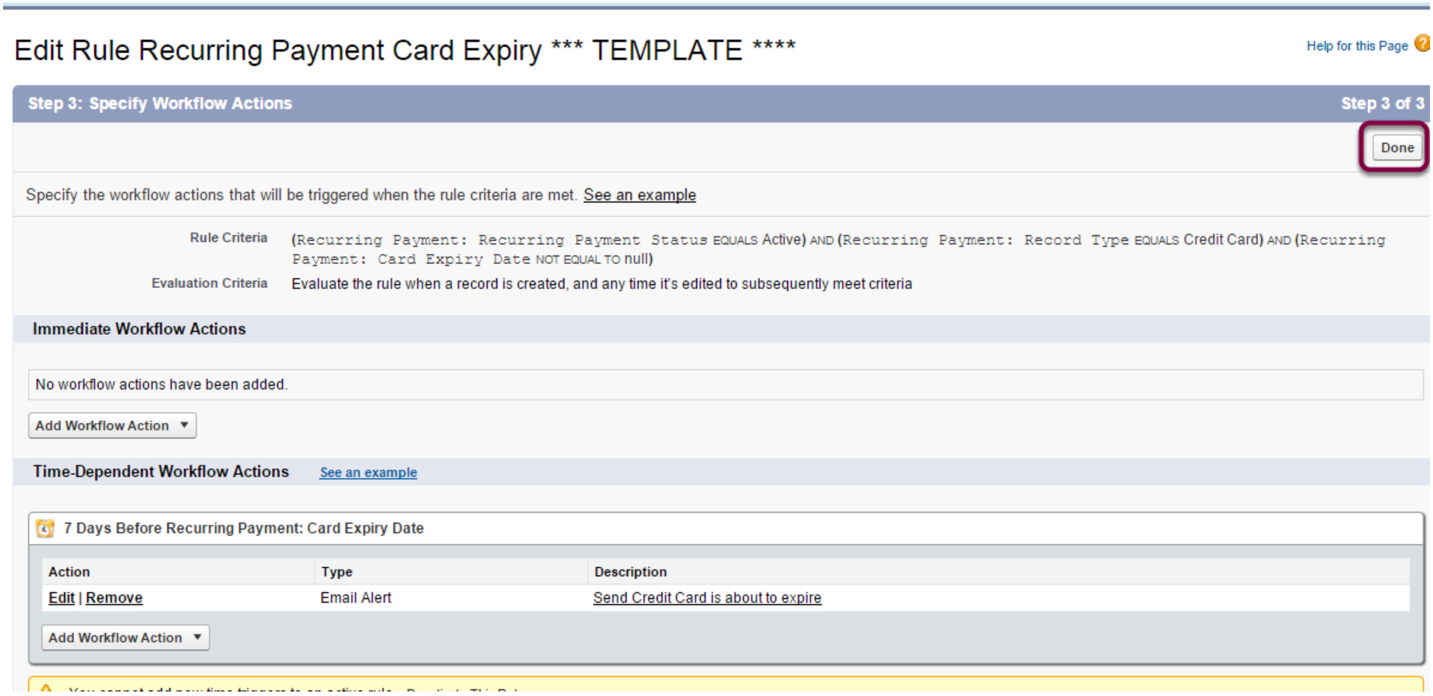


3.3 Select ‘Email Alert’ from the Choose Action Type drop down menu

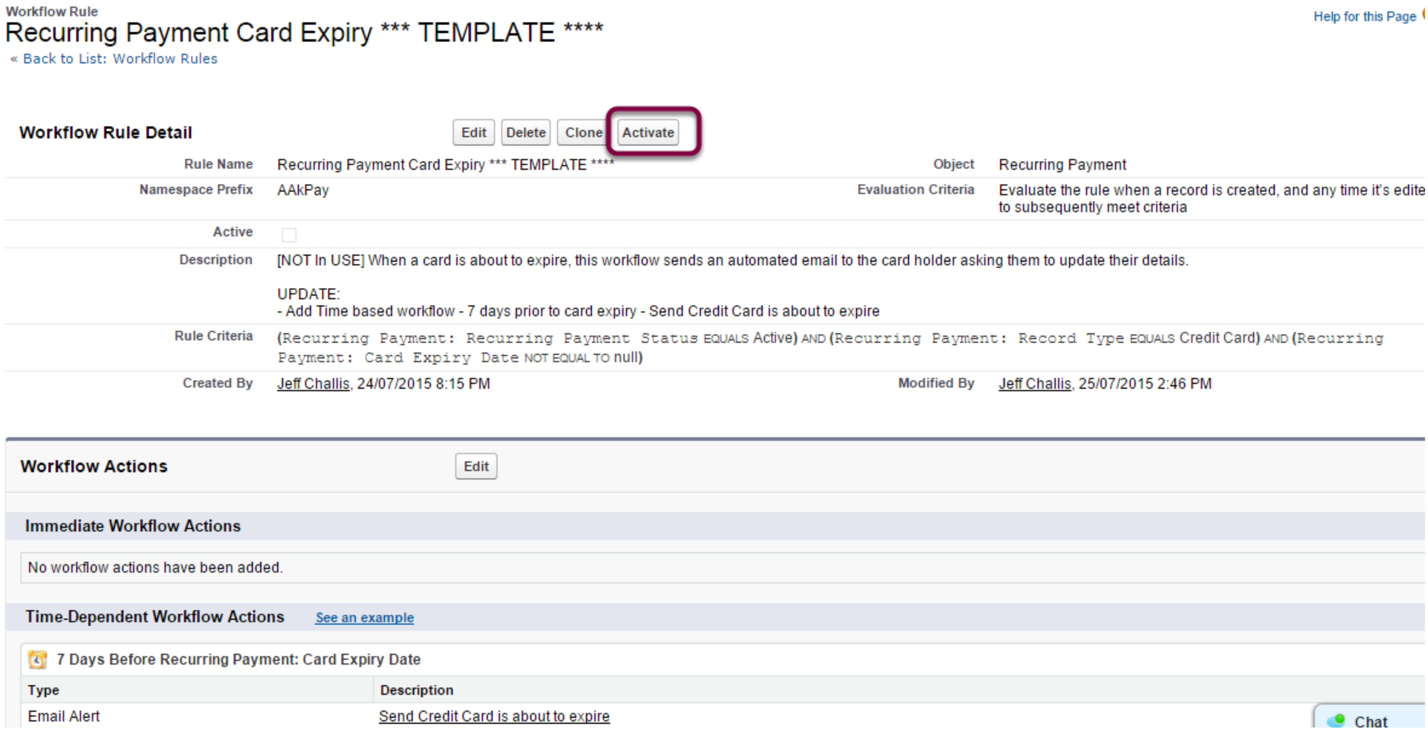


1. Search "Email Alert"
2. Select "Email Alert: Send Credit Card is about to expire"
3. Move to selected actions
4. Save

3.4 Select ‘Done’ button to complete the workflow rule



3.5 Select ‘Activate’ to begin the workflow process



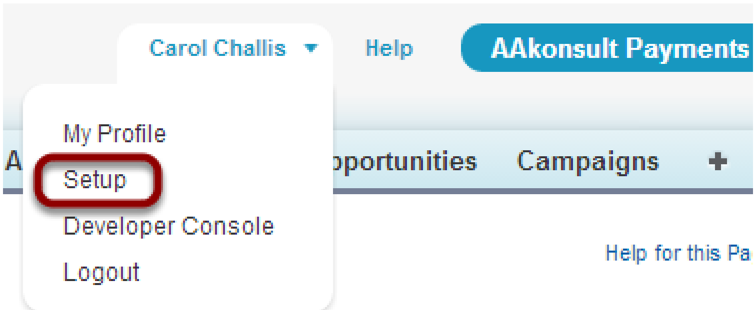
How to set up a recurring payment restart reminder

This workflow setup is required only if you are using recurring payments. The recurring payments run a scheduler that can be easily started or stopped by an authorised person from the Merchant Facility Tab. This time based workflow creates a reminder in case the processor is stopped and someone forgets to restart it again.

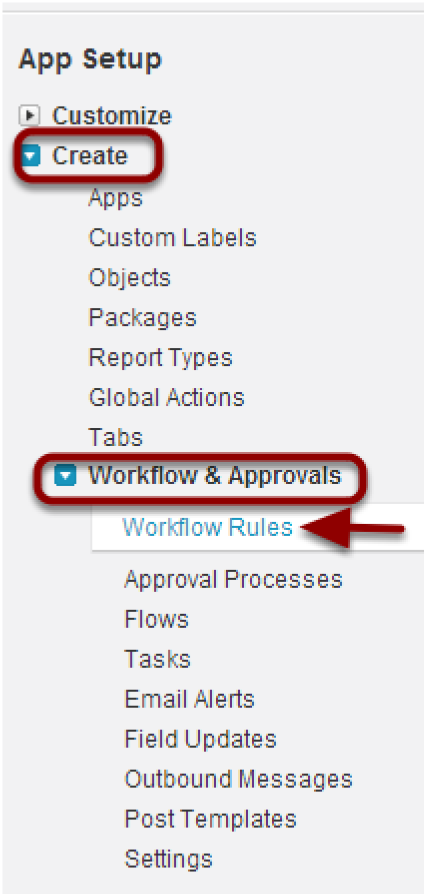
Quick Steps:

1. Clone Workflow rule "Recurring Payments Restart Reminder [ADD TIME BASED WORKFLOW]" and rename to "Recurring Payments Restart Reminder"
2. Add a Time-Dependant Action. Set it to fire 1 day after Rule Trigger date.
3. Add Action - Use existing workflow - "Email Alert: send reminders that Recurring Payments Processor has been stopped…"
4. Update the recipient of the Email Action "Email Alert: send reminders that Recurring Payments Processor has been stopped…" to be a contact in your organisation that will follow up this email alert.

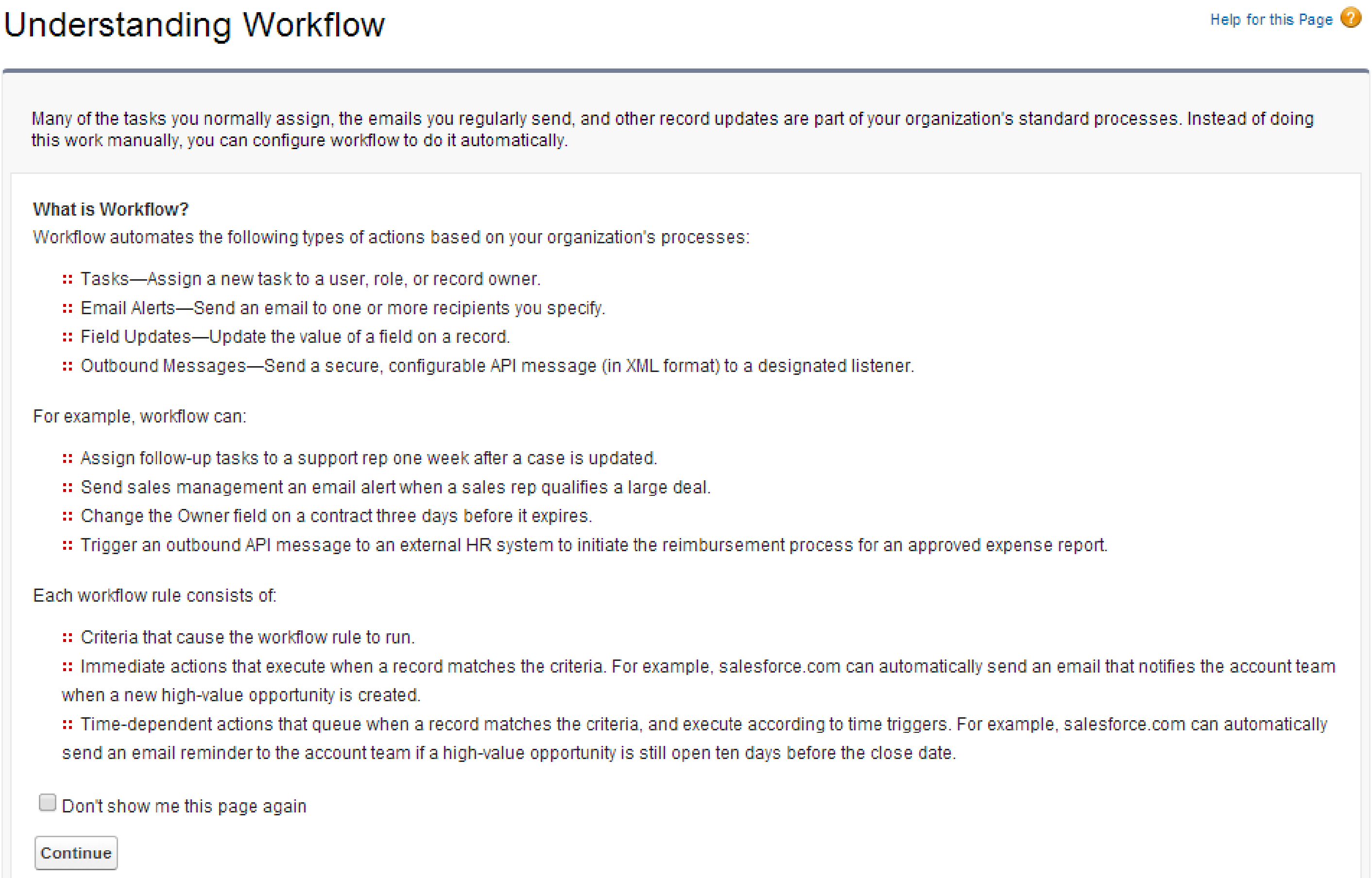
1. Navigate to Setup > App Setup > Create > Workflow & Approvals > Workflow Rules



1.1 Select 'Workflow Rules'



2. Read about Workflows and select 'Continue'



Understanding Workflow

Help for this Page

Many of the tasks you normally assign, the emails you regularly send, and other record updates are part of your organization's standard processes. Instead of doing this work manually, you can configure workflow to do it automatically.

What is Workflow?

Workflow automates the following types of actions based on your organization's processes:

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- Outbound Messages—Send a secure, configurable API message (in XML format) to a designated listener.

For example, workflow can:

- Assign follow-up tasks to a support rep one week after a case is updated.
- Send sales management an email alert when a sales rep qualifies a large deal.
- Change the Owner field on a contract three days before it expires.
- Trigger an outbound API message to an external HR system to initiate the reimbursement process for an approved expense report.

Each workflow rule consists of:

- Criteria that cause the workflow rule to run.
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Don't show me this page again

Continue

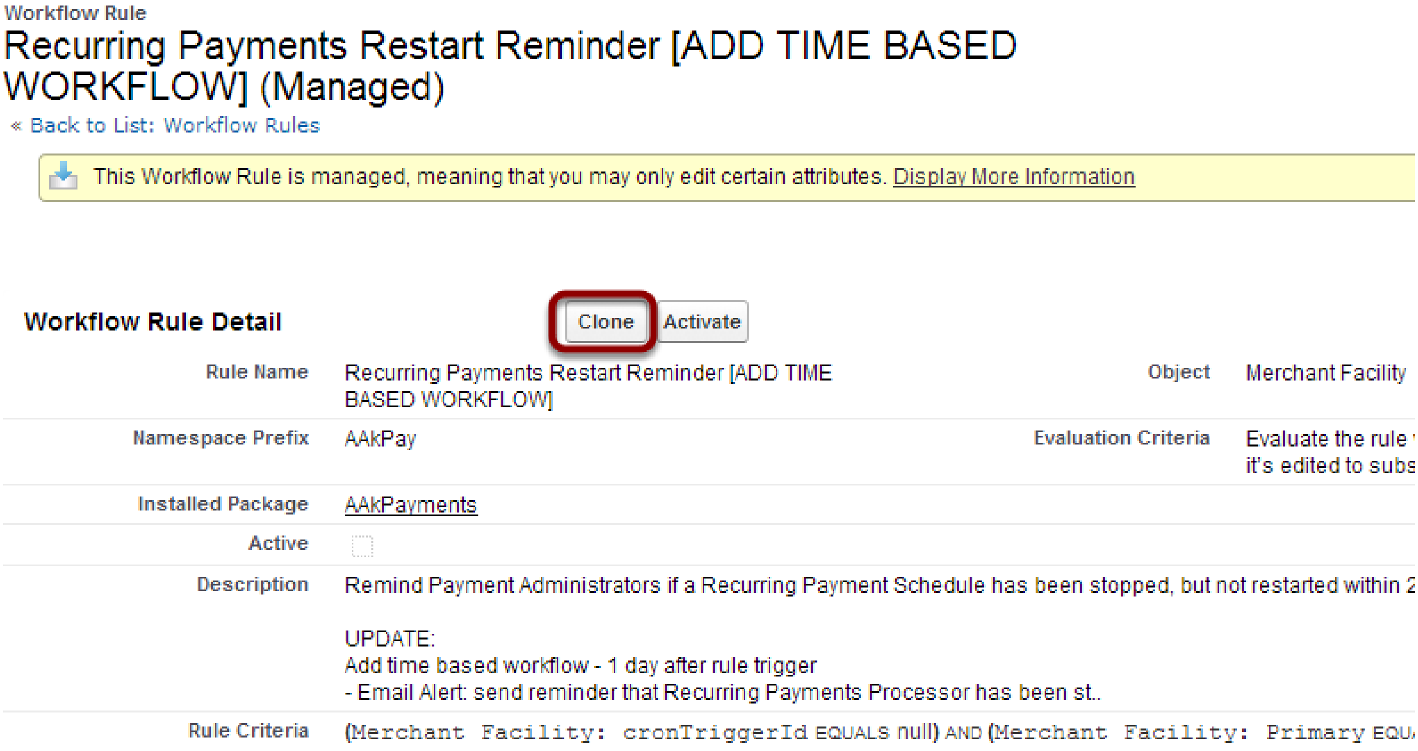
This page can be turned off.

3. Scroll down and select 'Recurring Payments Restart Reminder [ADD TIME BASED WORKFLOW]'

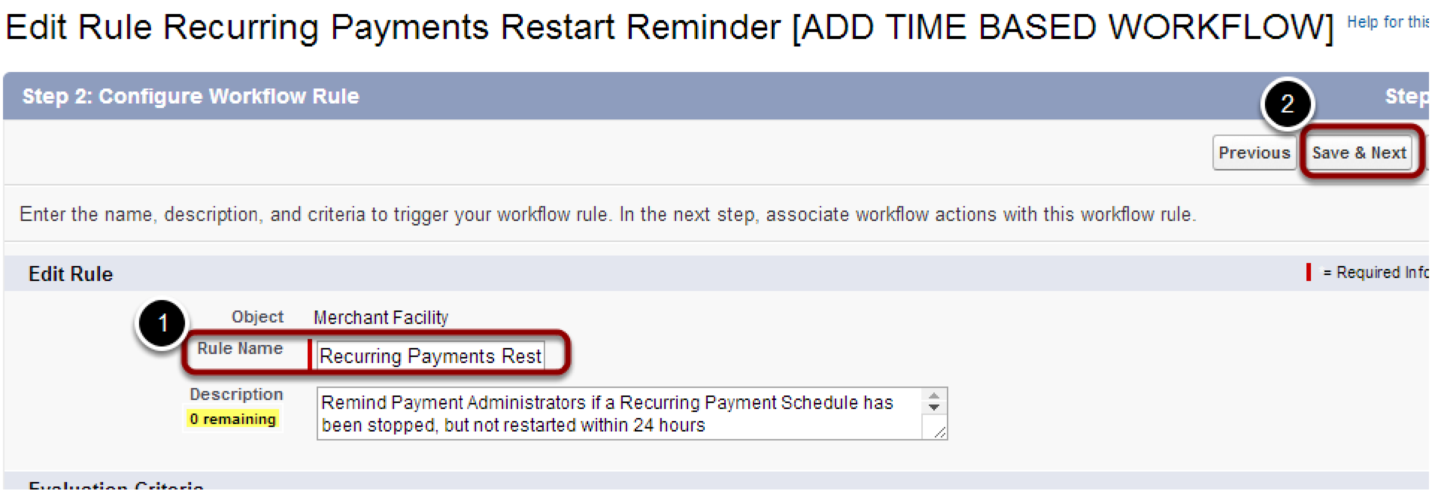
Edit | Activate	New Online Payment Notification	- configure who in your organisation is to get this notification. Send an internal notification that a new online payment has b Memberships as this is a separate workflow notification)
Edit | Activate	Payments - Recurring Process [ADD TIME BASED WORKFLOW]	Recurring Payments are placed in the Payments Queues wit time based workflow moves it to Payment Start to do the payı UPDATE: 1 Hr aft trg -Filed Update: set Status Payment Start
Edit | Del | Activate	Payments – Recurring	Recurring Payments are placed in the Payments Queues wit time based workflow moves it to Payment Start to do the payı UPDATE: 1 Hr aft trg -Filed Update: set Status Payment Start
Edit | Deactivate	Recurring Payment Card Expiry	For organisations that need to get their card holders expiry da this workflow will remind you of when to follow up.
Edit | Deactivate	Recurring Payment Error	Should a card be declined during a recurring payment send can follow up the reasons for the failure.
Edit | Activate	Recurring Payments Restart Reminder [ADD TIME BASED WORKFLOW]	Remind Payment Administrators if a Recurring Payment Sch restarted within 24 hours UPDATE: Add time based workflow - 1 day after rule trigger - Email Alert: send reminder that Recurring Payments Proces
Edit | Deactivate	Send Client Direct Debit Signup forms	After a new online Direct Debit Facility has been applied for, s what they need to do next in order to have their facility activate
Edit | Deactivate	Send Interim Refund Notification	Activate this method if you are not using the instant refund no of the refund confirmation to the online payer.
Edit | Activate	Send Interum Receipt	Activate this method if you are not using the instant receipts. payment confirmation to the online payer.
Edit | Deactivate	Send Pay Later Instructions	When the online Payment Method is Invoice Me, Pledge, Sen send details to the person making the order/donation.
Edit | Deactivate	Send Payment Schedule Invoice	When a Payment Schedule Recurring Payment is generated invoice asking for payment.

This may be located on the second or third page.

4. Select 'Clone'

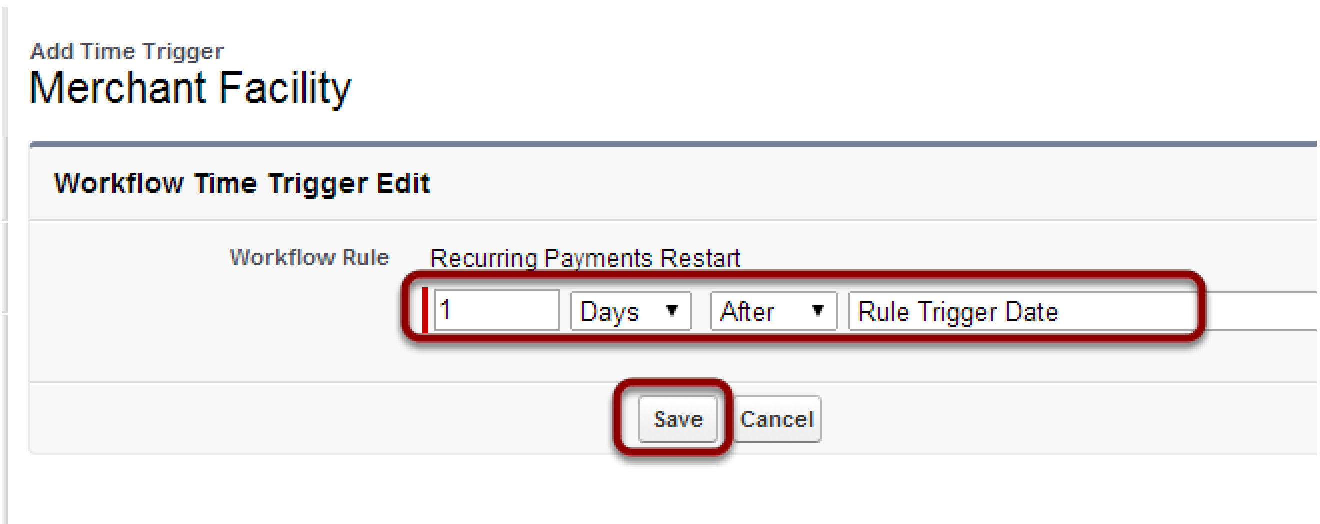


4.1 Re-name the workflow rule 'Recurring Payments Restart' and select 'Save & Next'



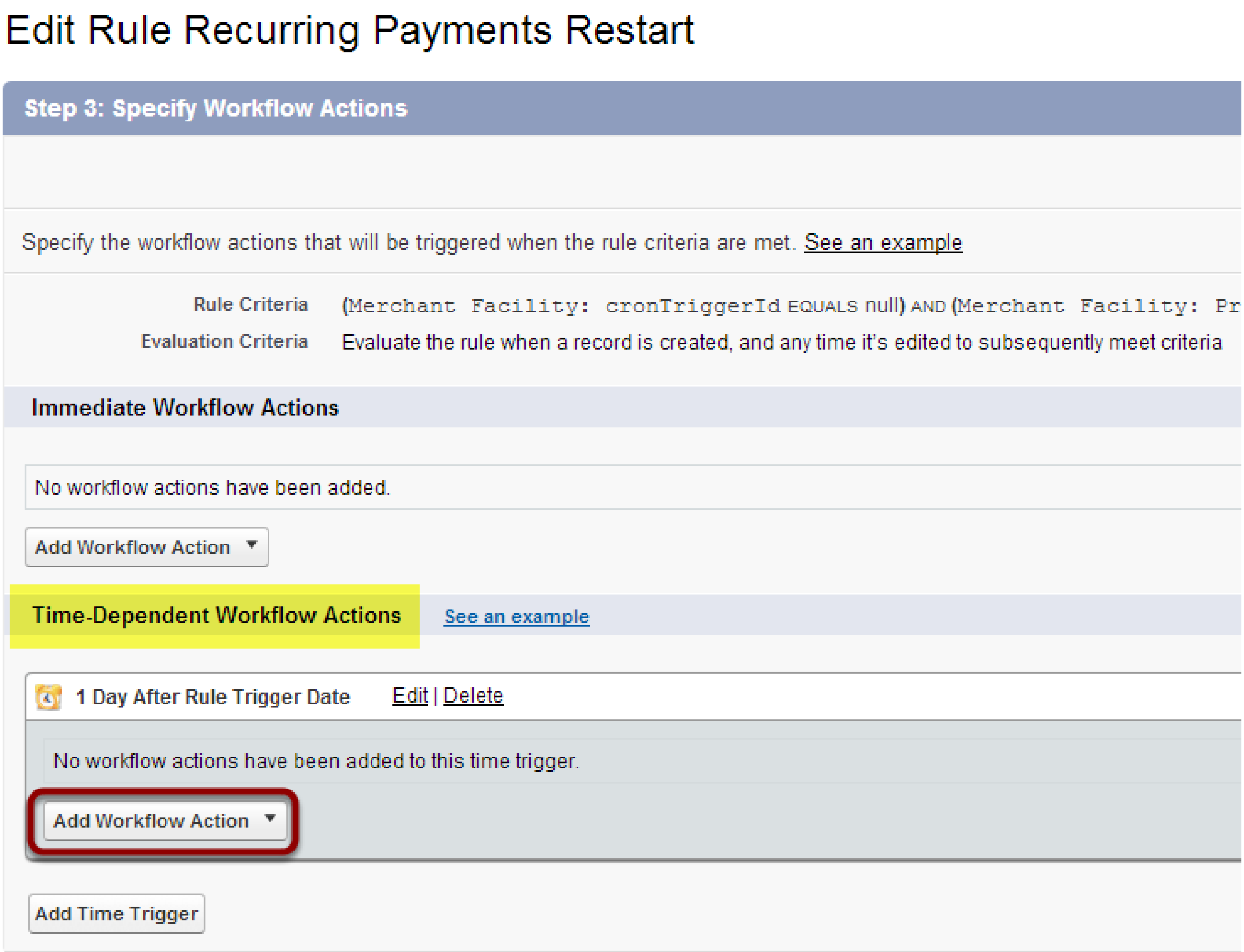
5. Select the 'Add Time Trigger' button

5.1 Set Time Trigger to '1 day after Rule Trigger Date' and Save

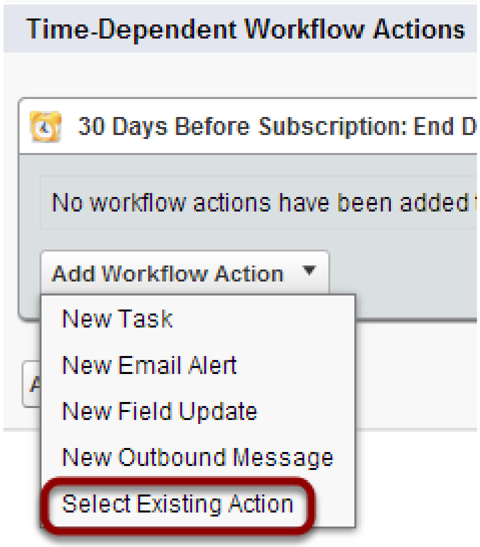


Note: You can change the number of days as required if you wish to give more/less notice.

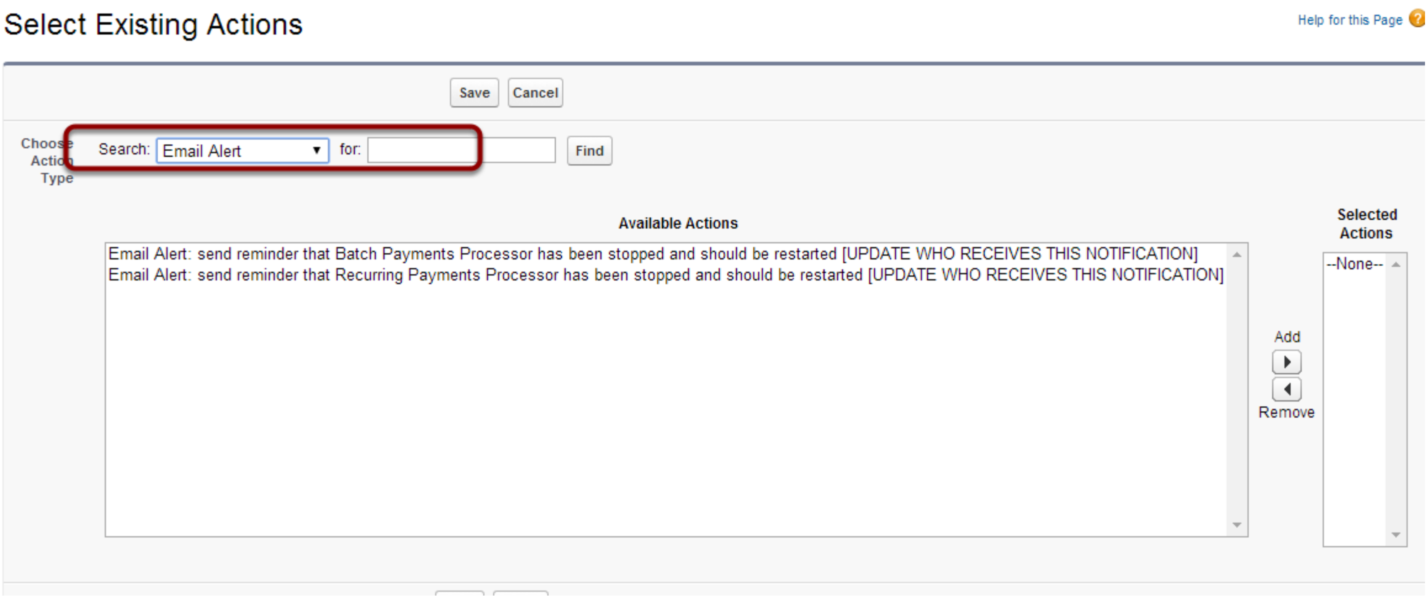
6. Select the 'Add Workflow Action' button in the Time Dependent Workflow Action section.



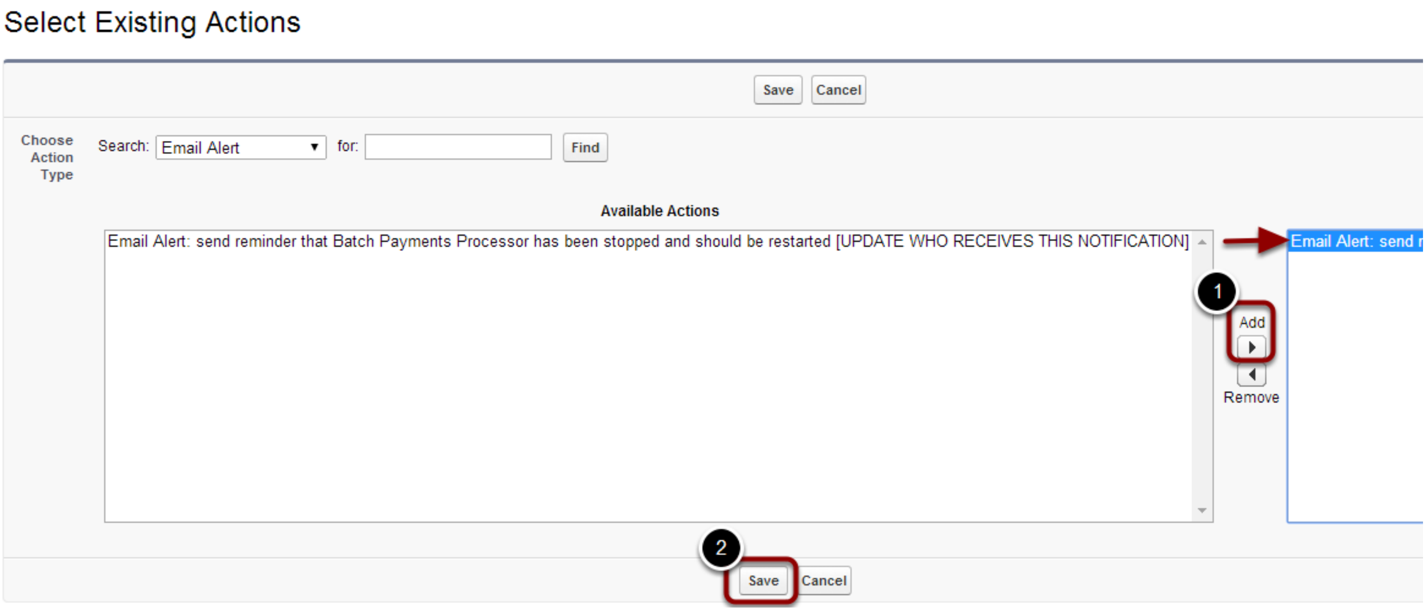
6.1 Select 'Select Existing Action from the drop down menu



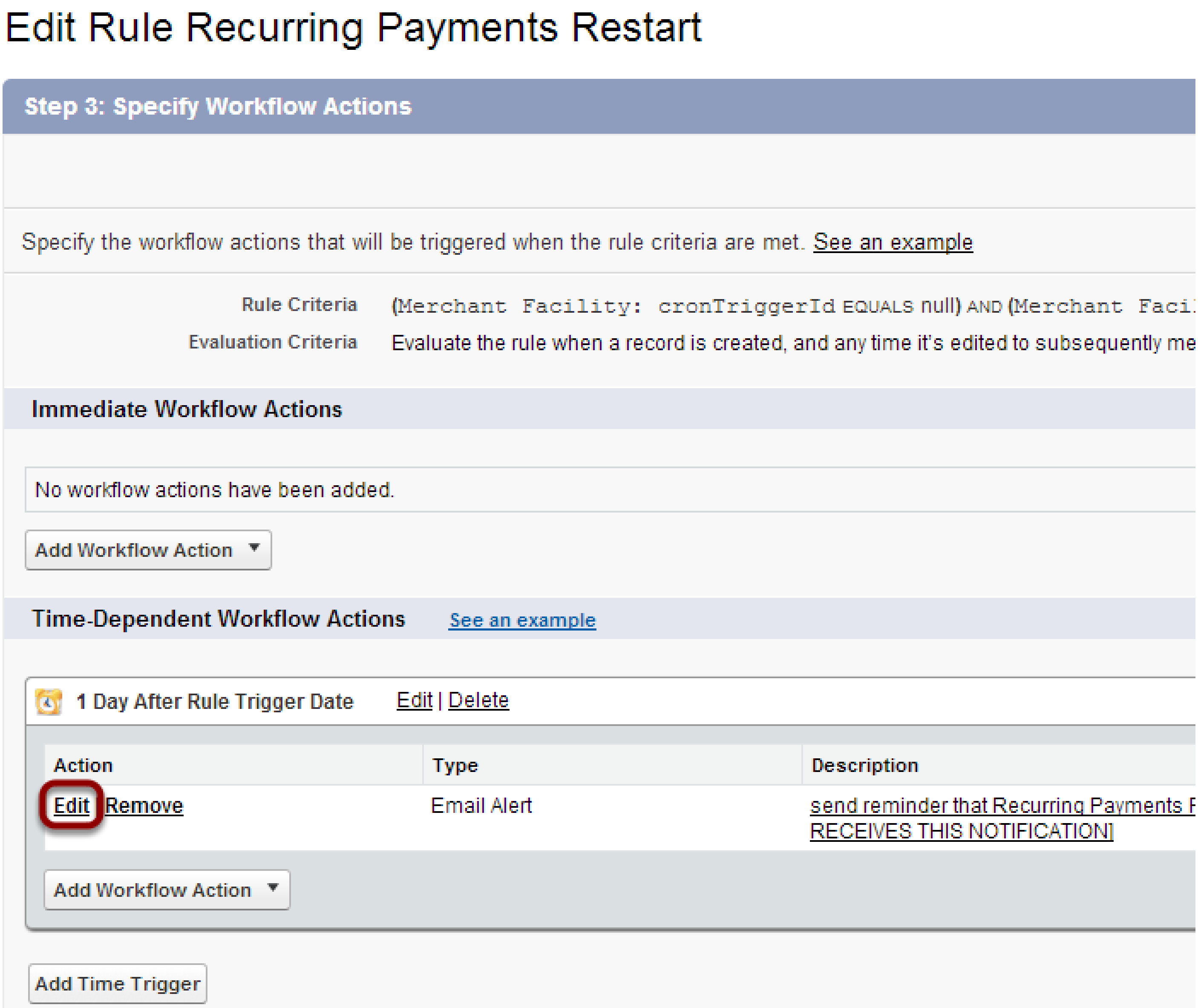
6.2 Select 'Email Alert' from the Choose Action Type drop down menu



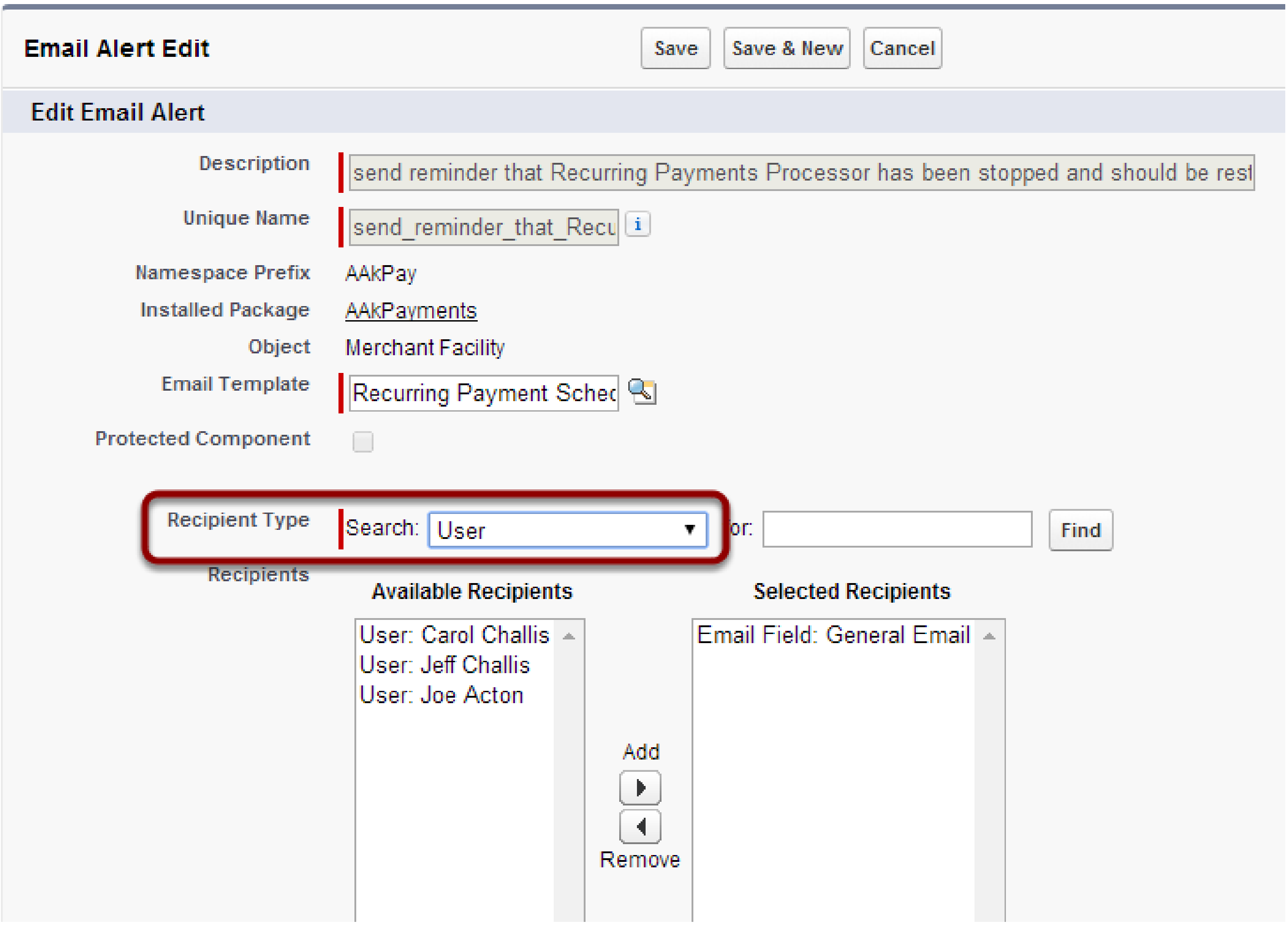
6.3 Add 'Email Alert: send reminders that Recurring Payments Processor has been stopped...' and Save



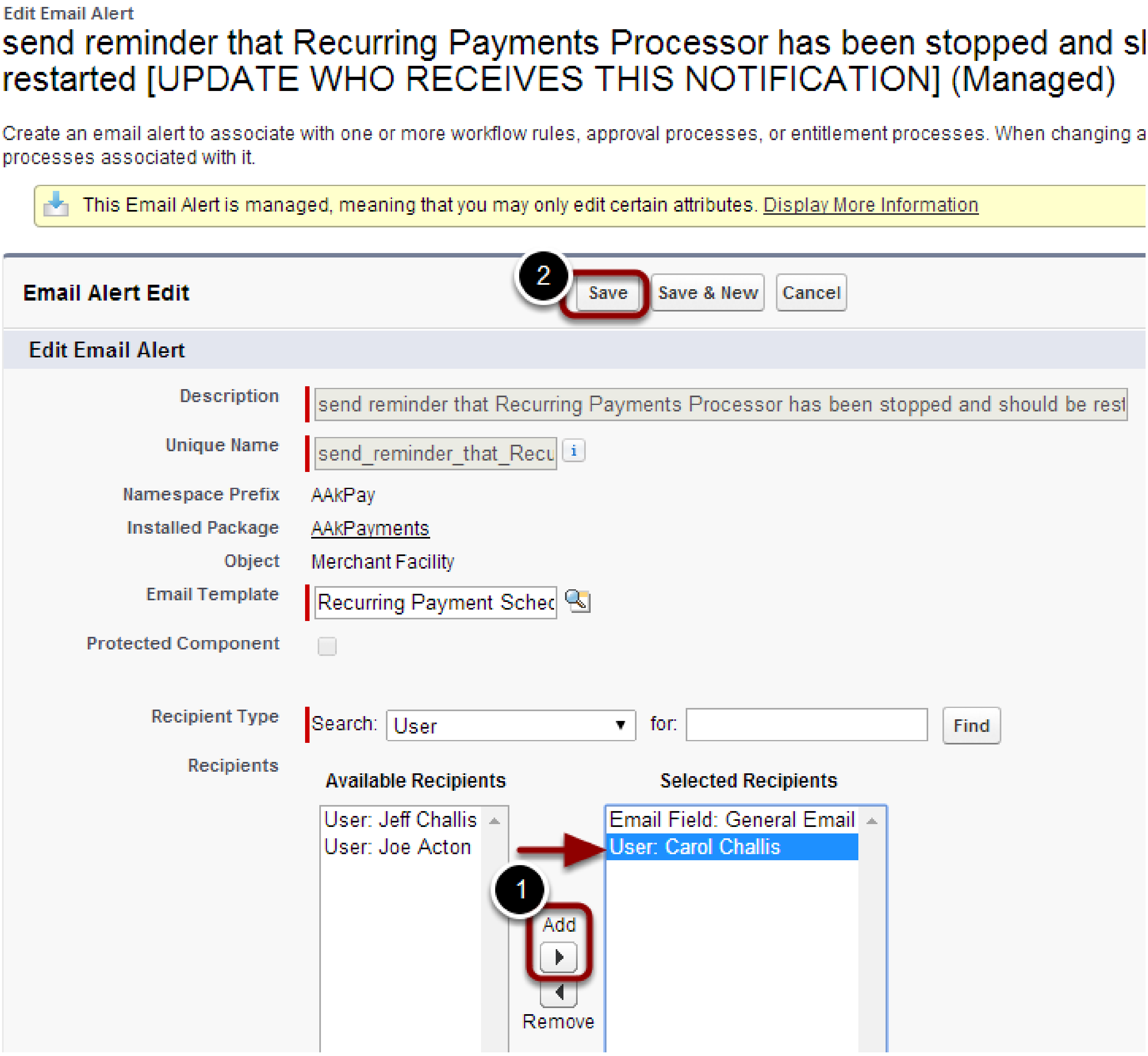
7. Select 'Edit' on the Actions list for the new rule



7.1 Select 'User' from the 'Recipient Type' drop down list

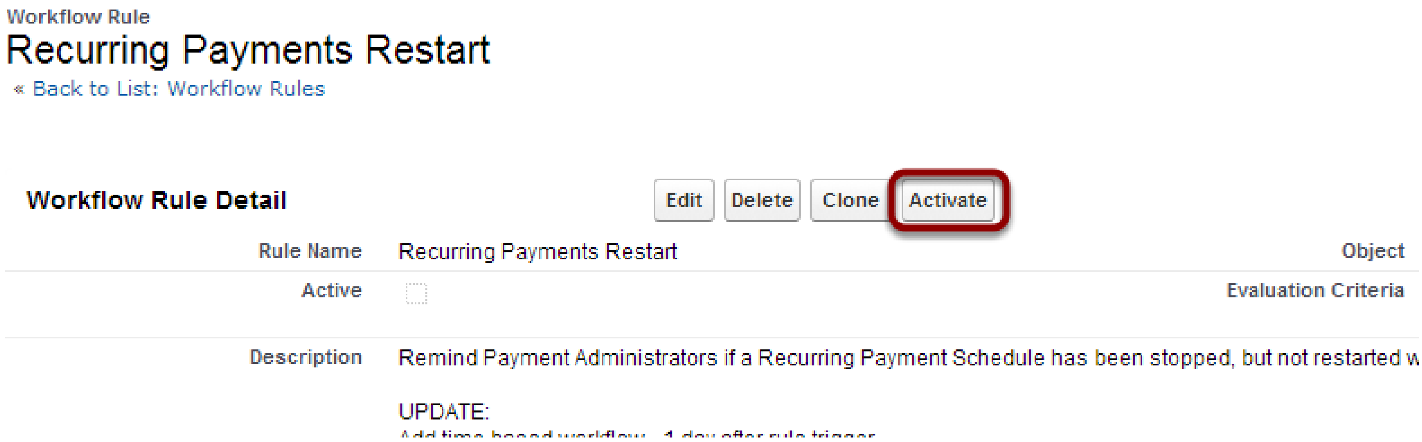


7.2 Add chosen Admin User to receive email notification and 'Save'

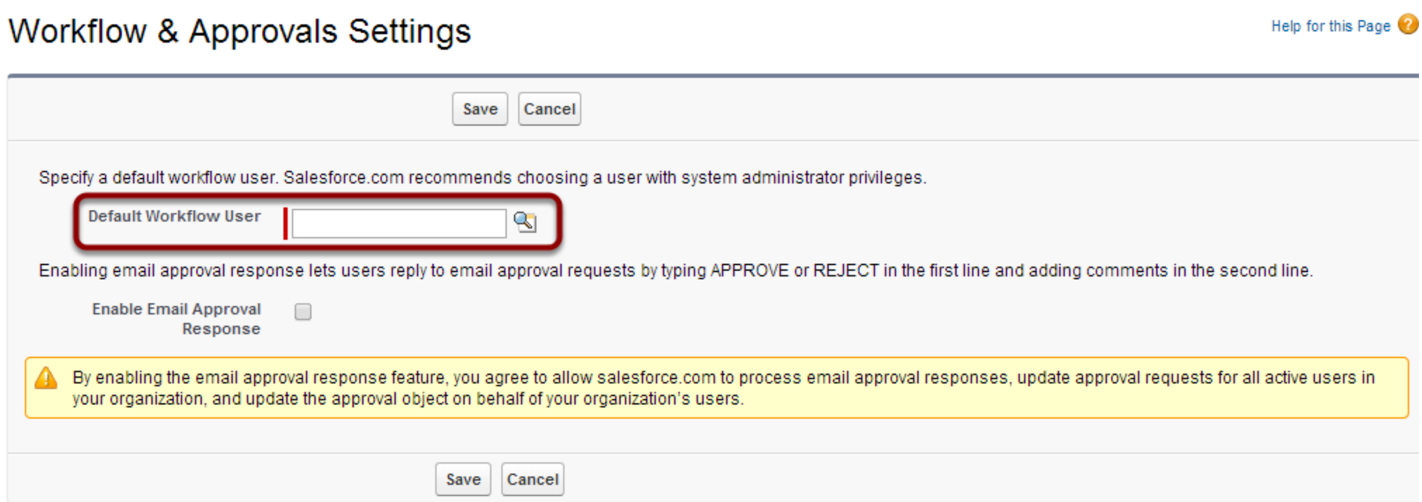


8. Select 'Done' button to complete the workflow rule

8.1 Select 'Activate' to begin the workflow process



8.2 Set 'Default Workflow User' and Save



If a Default Workflow User has already been set, this step will be skipped.

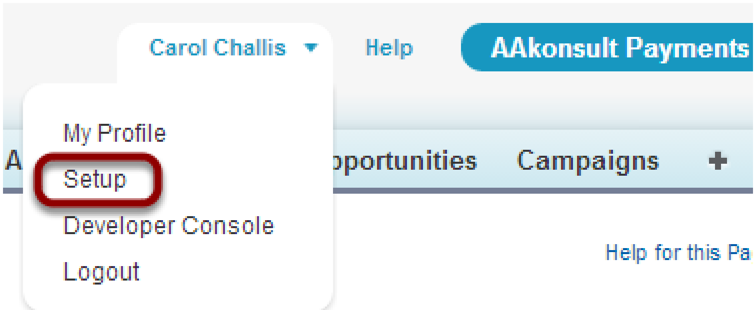
How to set up the batch payments process restart reminder

The Batch Payment Processor is started from the “Start” button on the Merchant Facility and processes new transactions every 10 minutes. This workflow is used if the Batch Payment Processor has been running and has been turned off for more than 24 hours.

Quick Steps:

1. Clone Workflow rule " Batch Payments Process Restart Reminder [ADD TIME BASED WORKFLOW]" and rename to "Batch Payments Process Restart Reminder"
2. Add a Time-Dependant Action. Set it to fire 1 day after Rule Trigger date.
3. Add Action - Use existing workflow - "Email Alert: send reminder that Batch Payments Processor has been stopped and should be restarted [UPDATE WHO RECEIVES THIS NOTIFICATION]"
4. Update the recipient of the Email Action "Email Alert: send reminder that Batch Payments Processor has been stopped and should be restarted [UPDATE WHO RECEIVES THIS NOTIFICATION]" to be a contact in your organisation that will follow up this email alert.

1. Navigate to Setup > App Setup > Create > Workflow & Approvals > Workflow Rules



1.1 Select 'Workflow Rules'

2. Read about Workflows and select 'Continue'

Understanding Workflow

Help for this Page

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Continue

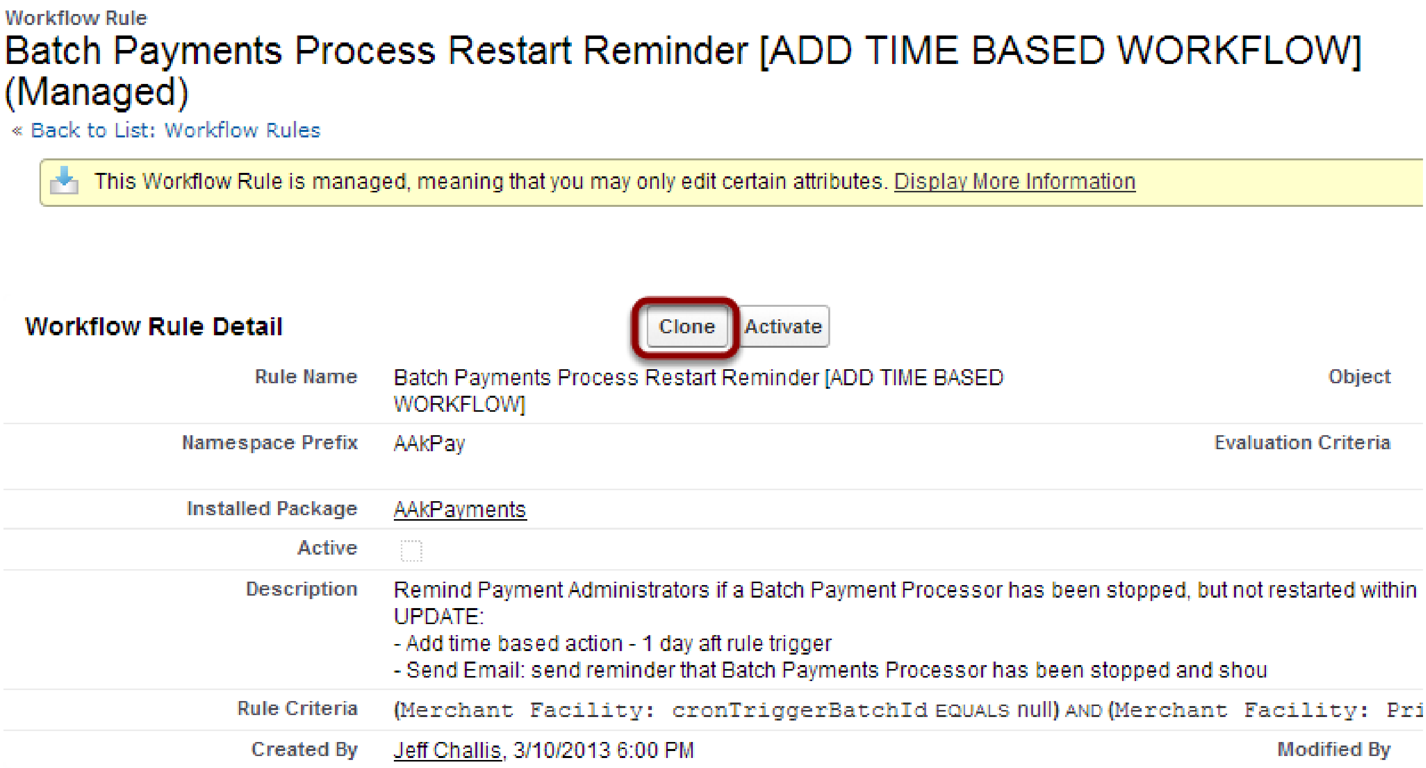
This page can be turned off.

3. Scroll down and select 'Batch Payments Process Restart Reminder [ADD TIME BASED WORKFLOW]'

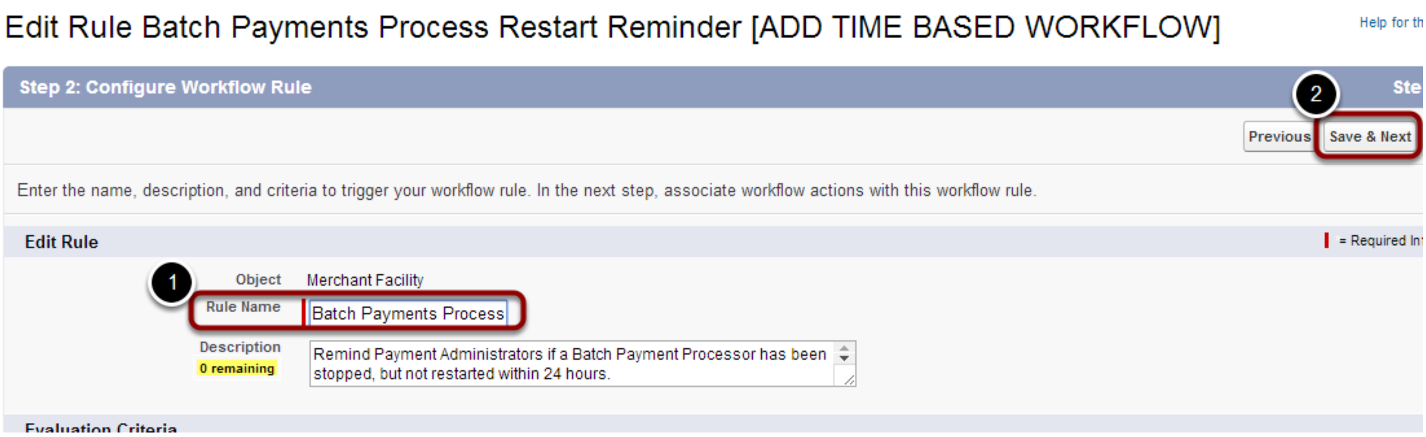
Edit | Del | Activate	2nd Renewal Reminder	UPDATE: Add Time Based Workflow, 10 days after Subscı - Email Alert: send 2nd Renewal Reminder Emɛ Keep in mind Automatic Renewals
Edit | Activate	2nd Renewal Reminder [ADD TIME BASED WORKFLOW]	Email Contact a reminder that their subscription UPDATE: Add Time Based Workflow, 10 days after Subscı - Email Alert: send 2nd Renewal Reminder Emɛ Keep in mind Automatic Renewals
Edit | Activate	Account Membership Confirmation	Sends out a confirmation email when a Account renews.
Edit | Activate	Batch Payment Processor Not Running [ADD TIME BASED WORKFLOW]	Advise Payment Administrators if a Batch Payme hours. - Add time based action - 1 day aft Last Batch Pr - Send Email: send reminder that Batch Paymer
Edit | Activate	Batch Payments Process Restart Reminder [ADD TIME BASED WORKFLOW]	Remind Payment Administrators if a Batch Payn within 24 hours. UPDATE: - Add time based action - 1 day aft rule trigger - Send Email: send reminder that Batch Paymer
Edit | Activate	Create Account URL Token	Sets Create URL Checkbox to trigger creation of Update the filter parameters for this workflow to URL Tokens are used for creating object specifi
Edit | Activate	Create Campaign URL Token	Sets Create URL Checkbox to trigger creation of Update the filter parameters for this workflow to URL Tokens are used for creating object specifi
Edit | Activate	Create CampaignMember URL Token	Sets Create URL Checkbox to trigger creation of Update the filter parameters for this workflow to URL Tokens are used for creating object specifi
Edit | Activate	Create Case URL Token	Sets Create URL Checkbox to trigger creation of Update the filter parameters for this workflow to URL Tokens are used for creating object specifi

This may be located on the second page.

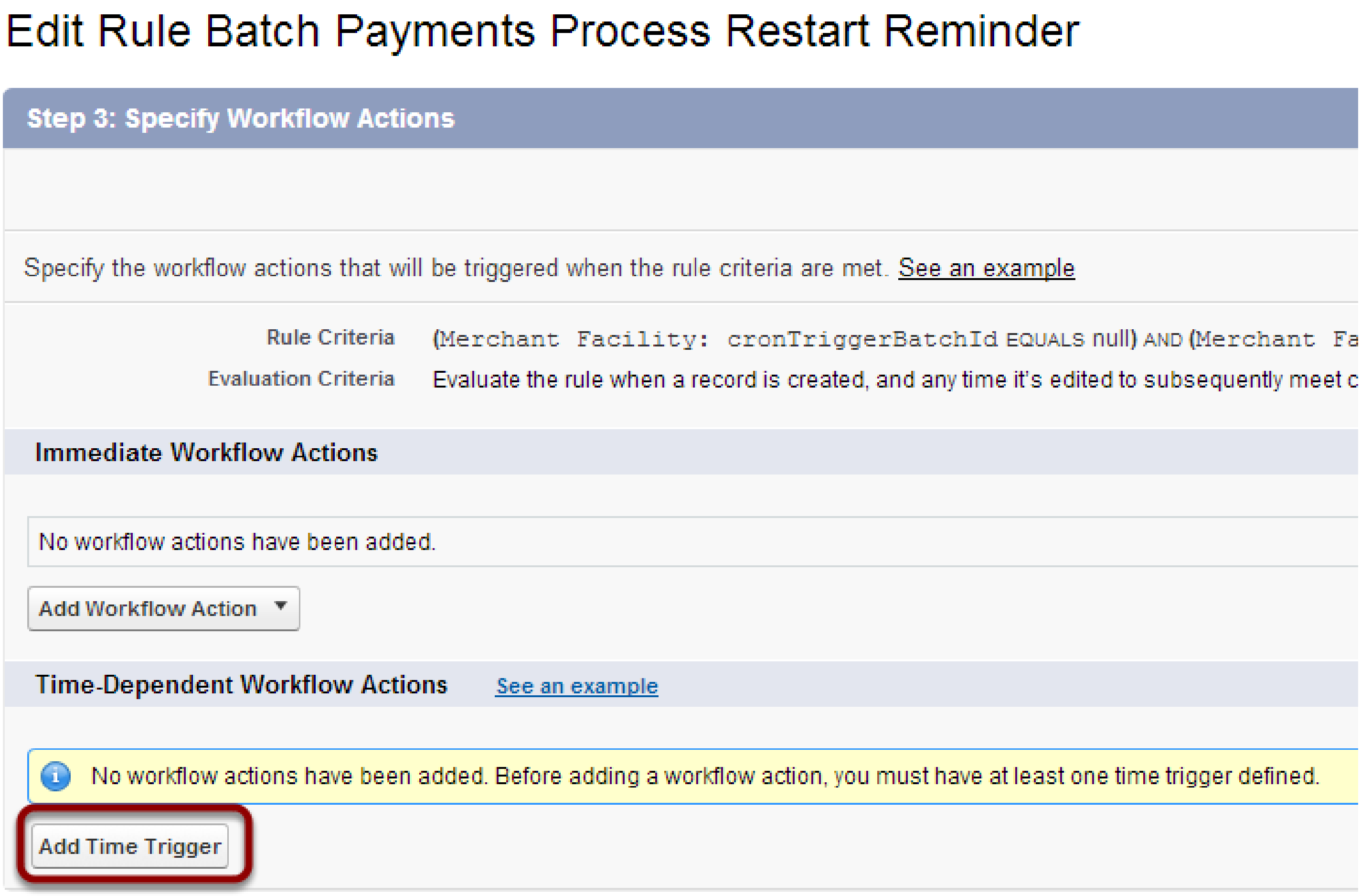
4. Select 'Clone'



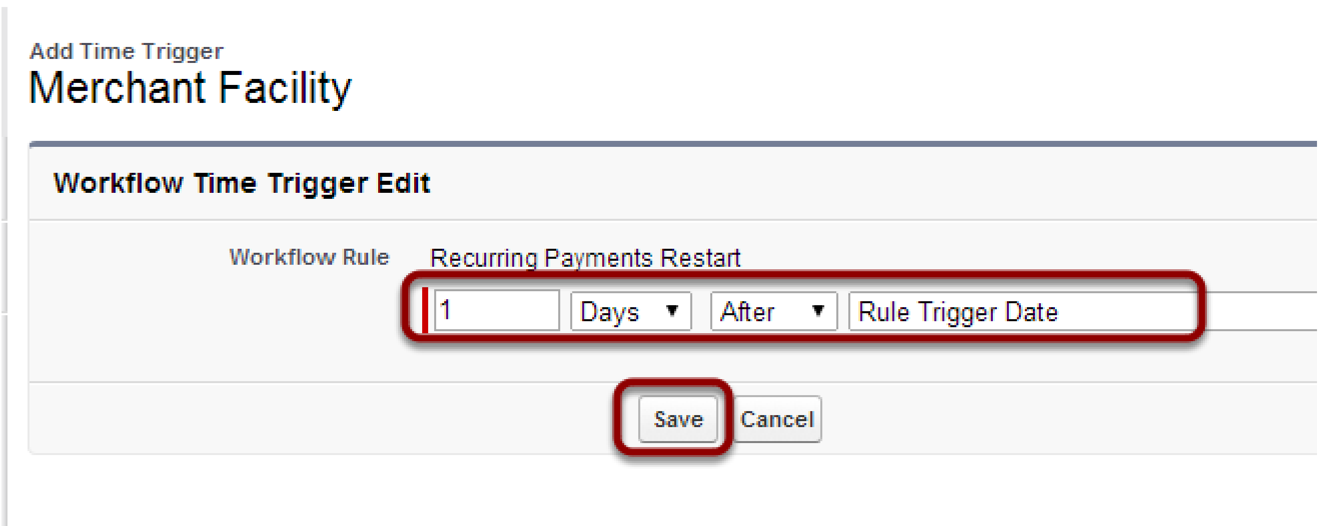
4.1 Re-name the workflow rule 'Batch Payments Process Restart Reminder' and select 'Save & Next'



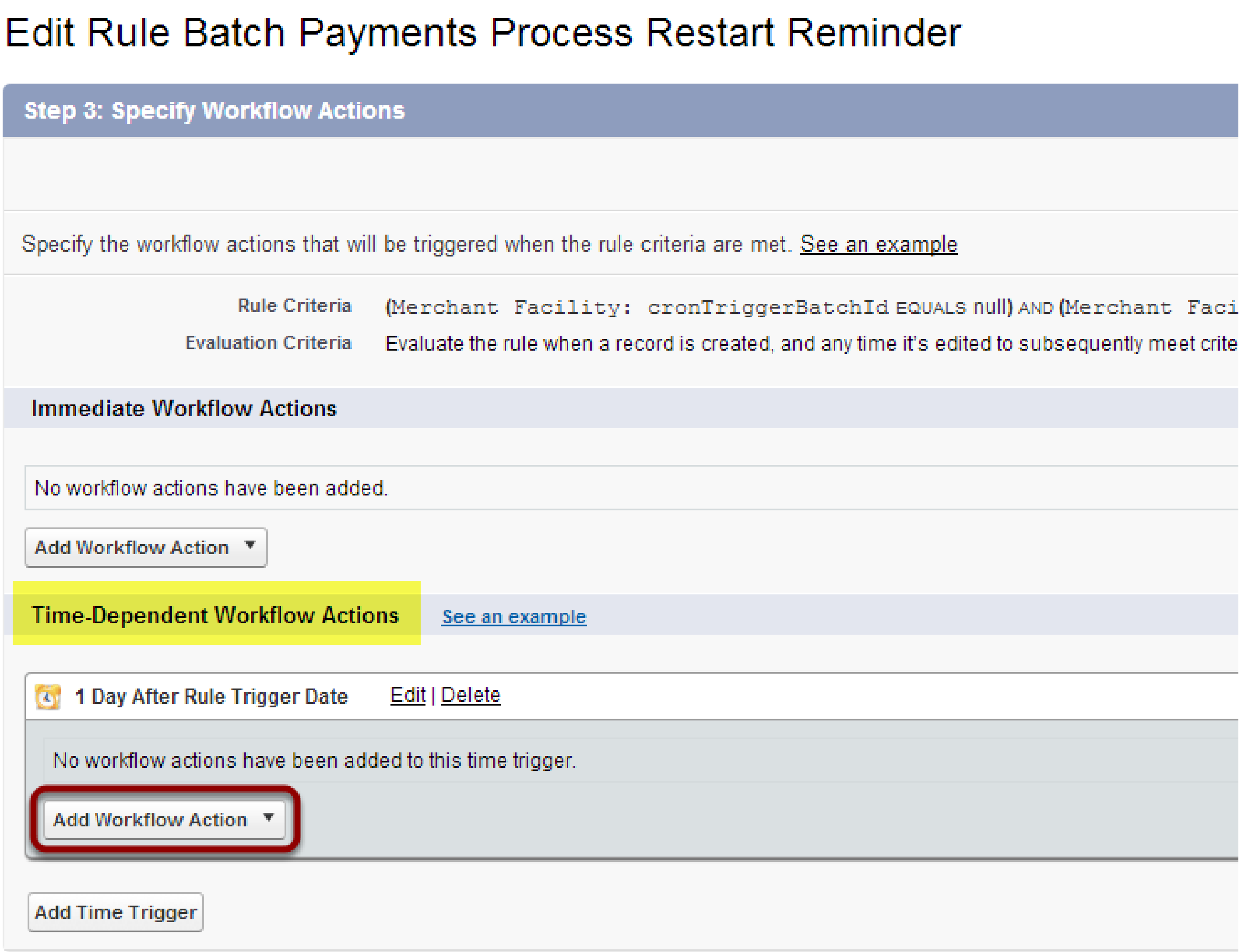
5. Select the 'Add Time Trigger' button



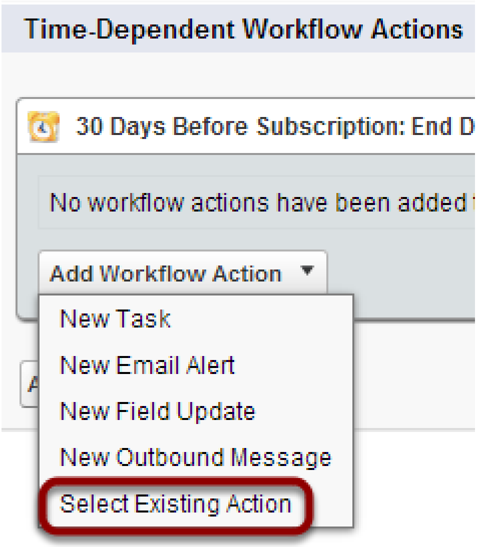
5.1 Set Time Trigger to '1 day after Rule Trigger Date' and 'Save'



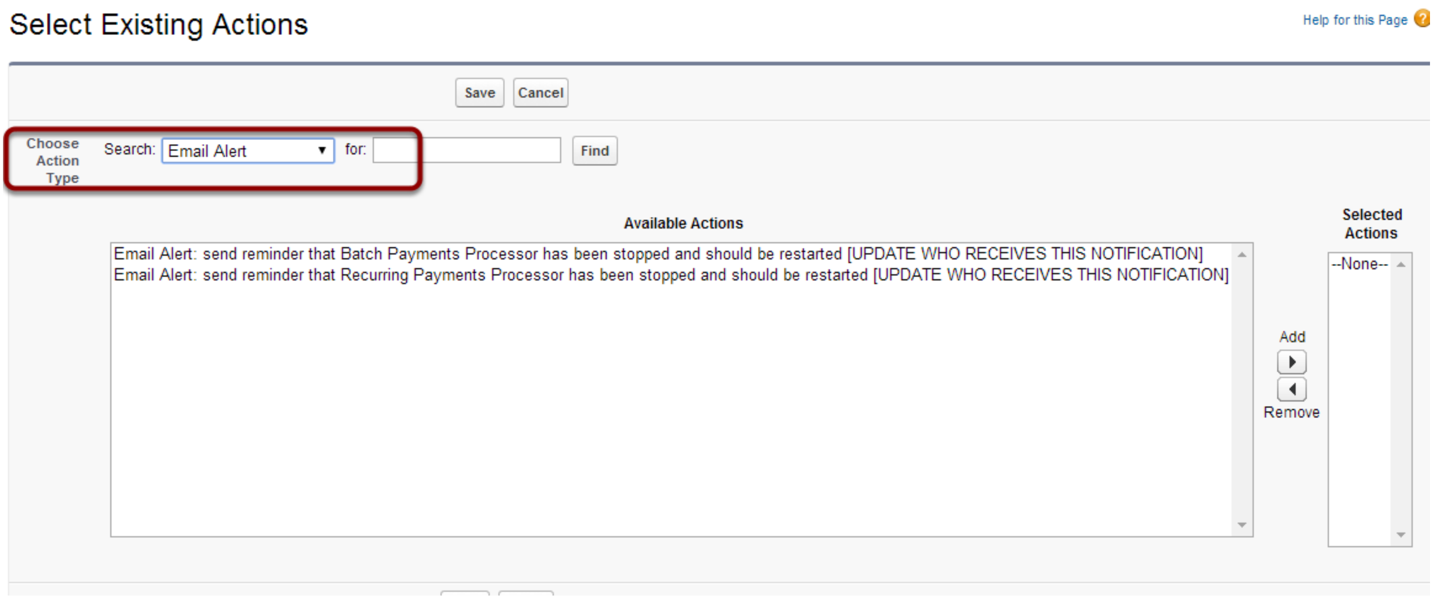
6. Select the 'Add Workflow Action' button in the Time Dependent Workflow Action section.



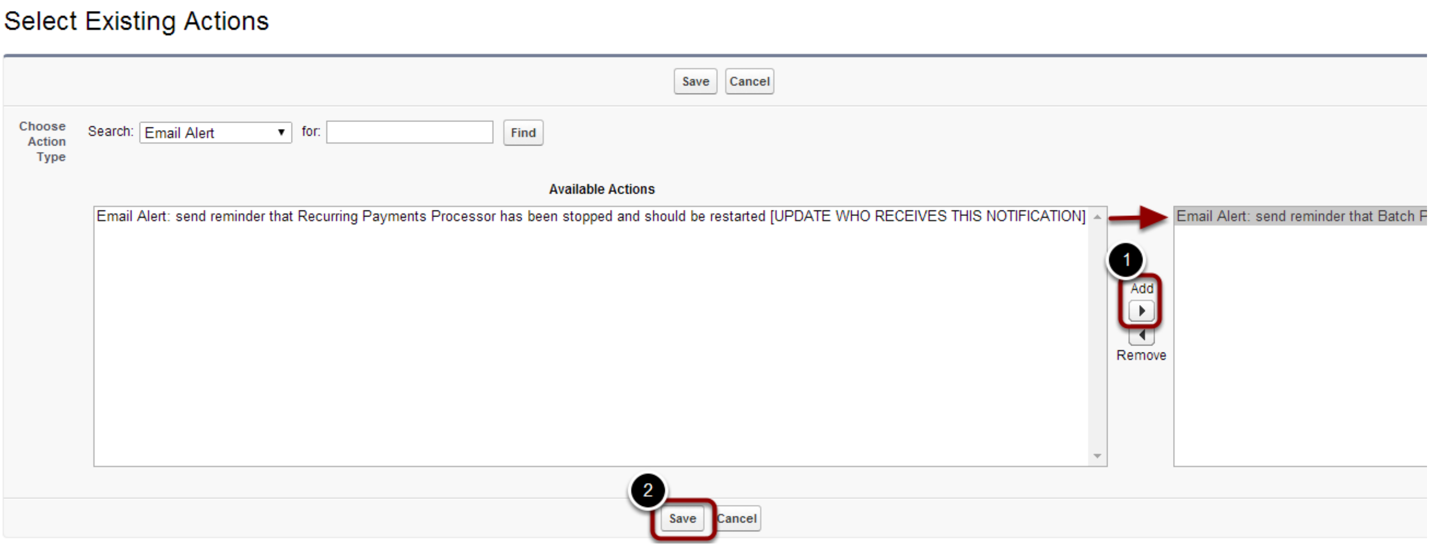
6.1 Select 'Select Existing Action from the drop down menu



6.2 Select 'Email Alert' from the Choose Action Type drop down menu

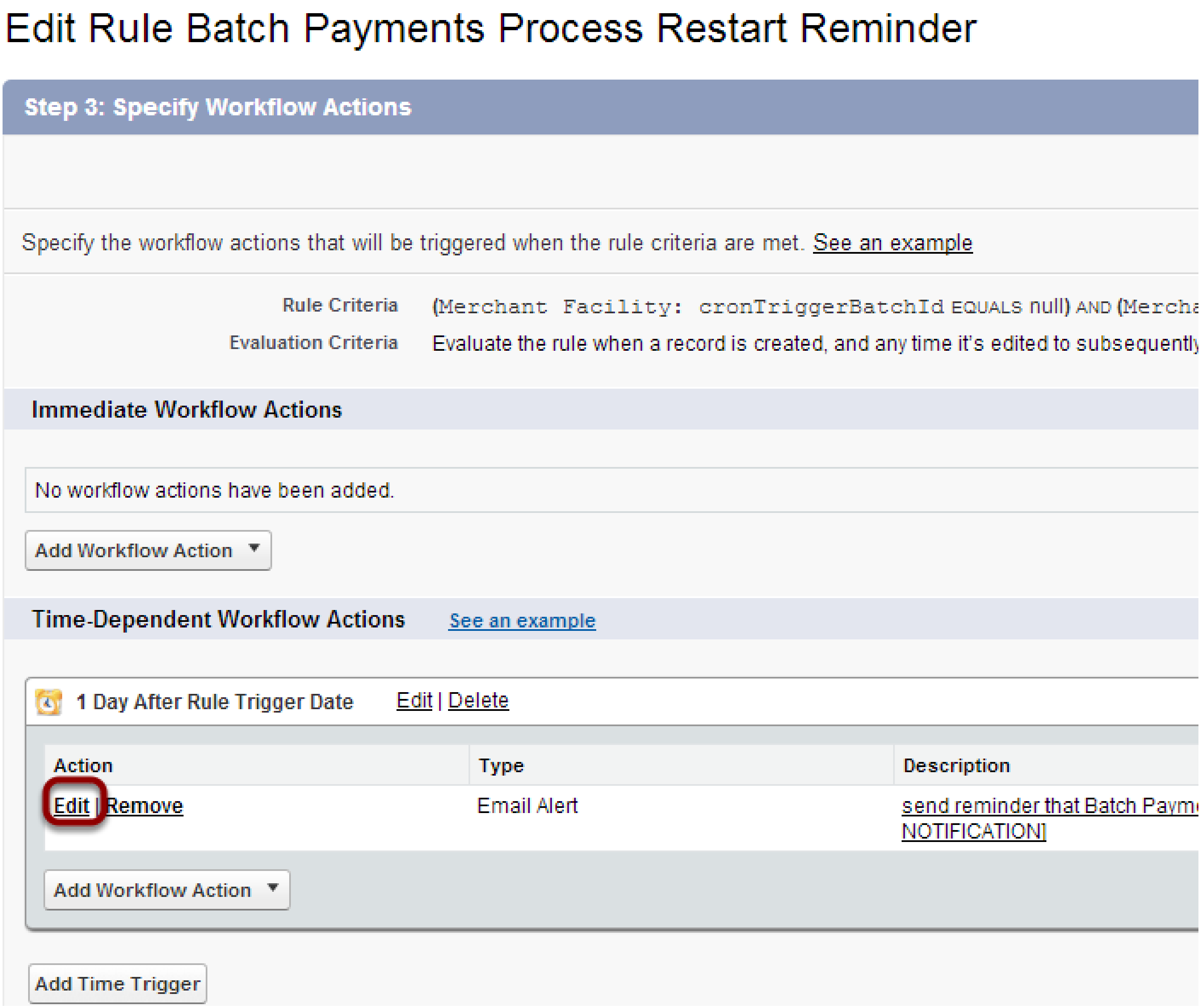


6.3 Add 'Email Alert: send reminder that Batch Payments Processor has been stopped and should be restarted …' and 'Save'

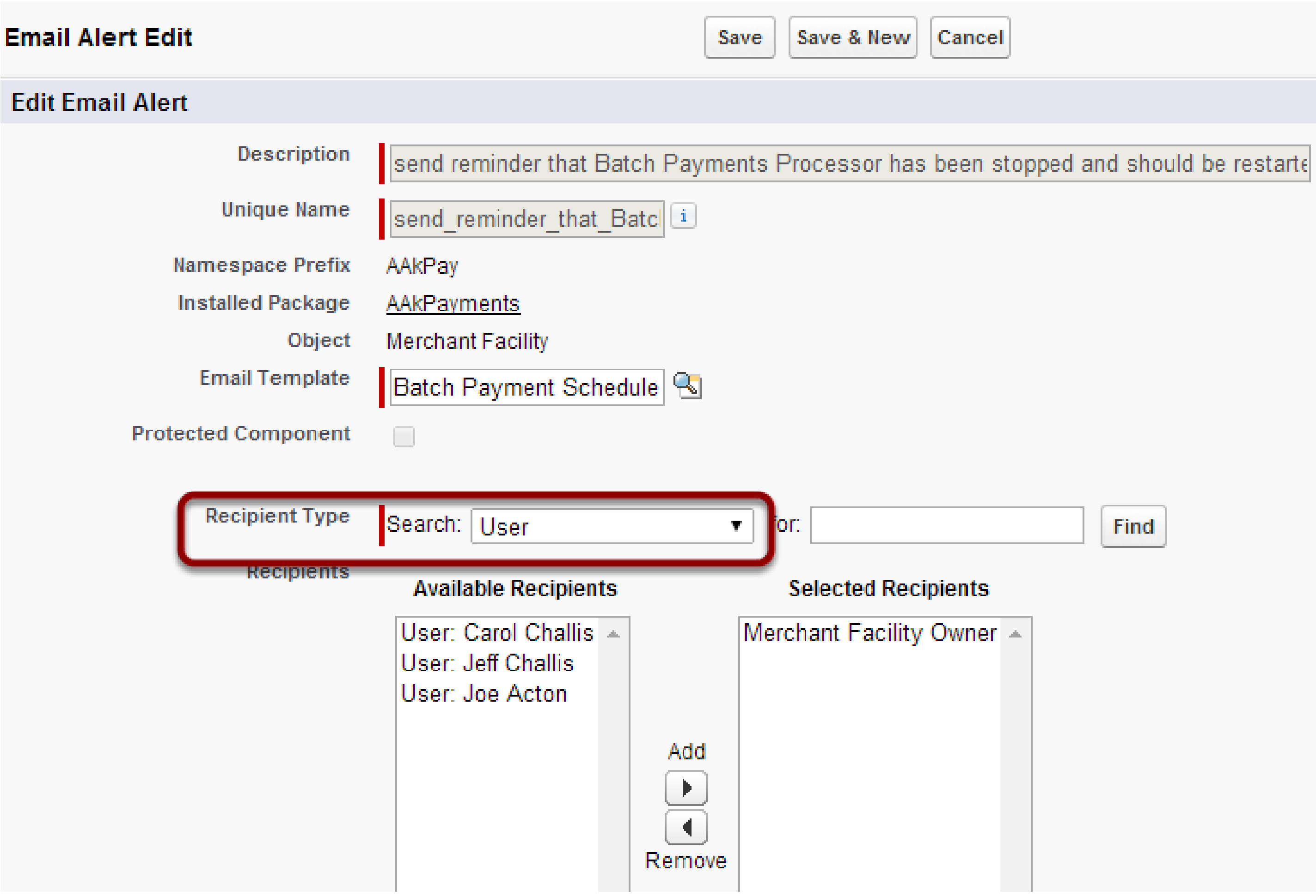


Scroll across image to see actions.

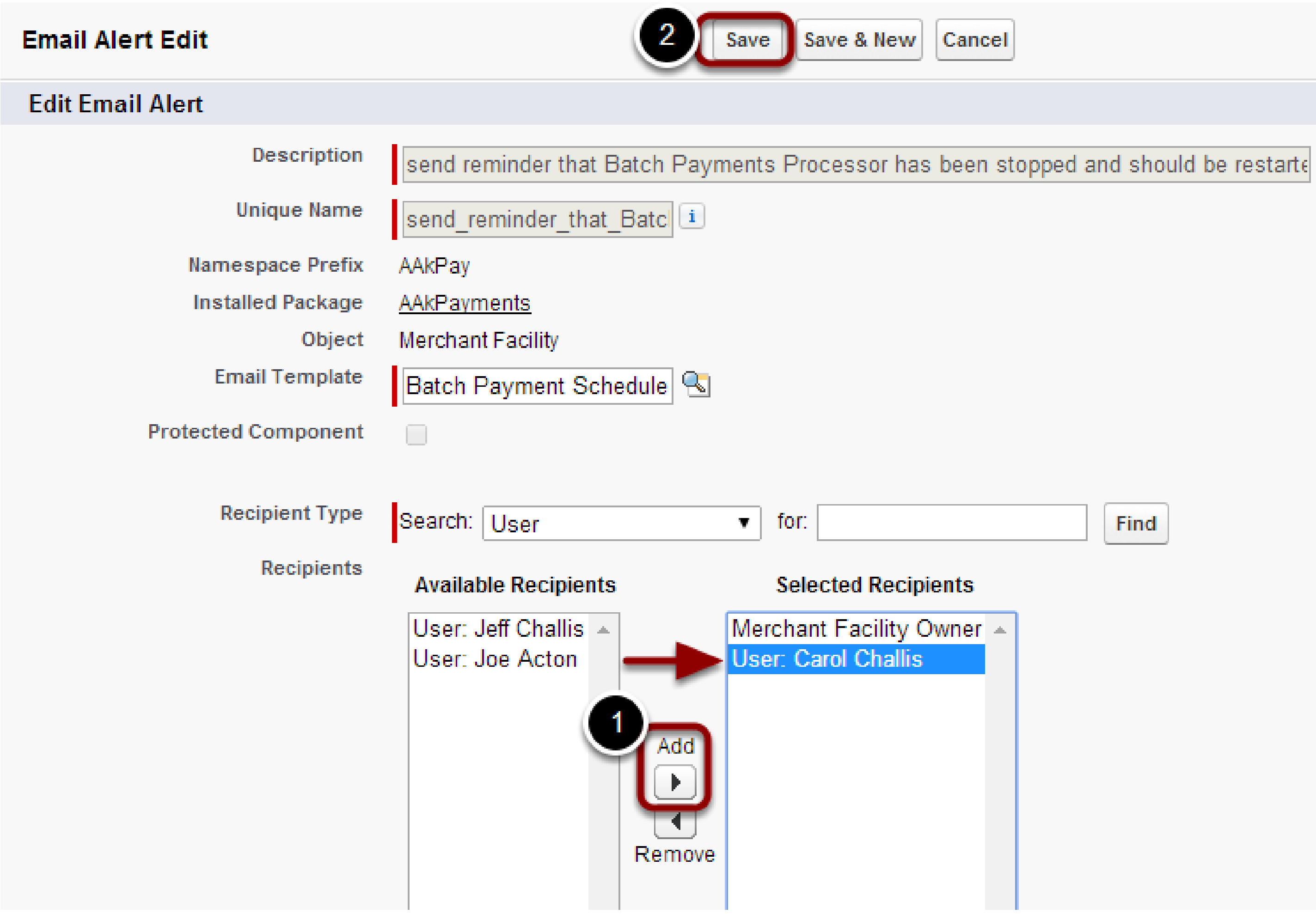
7. Select 'Edit' on the Actions list for the new rule



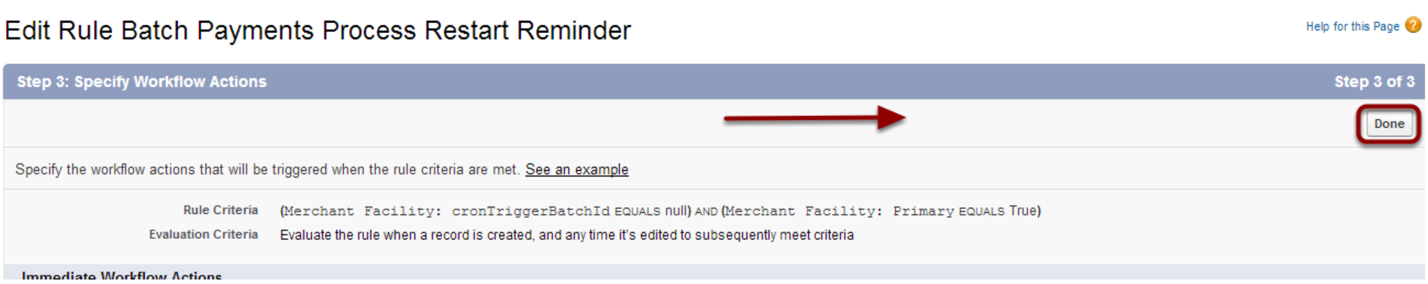
7.1 Select 'User' from the 'Recipient Type' drop down list



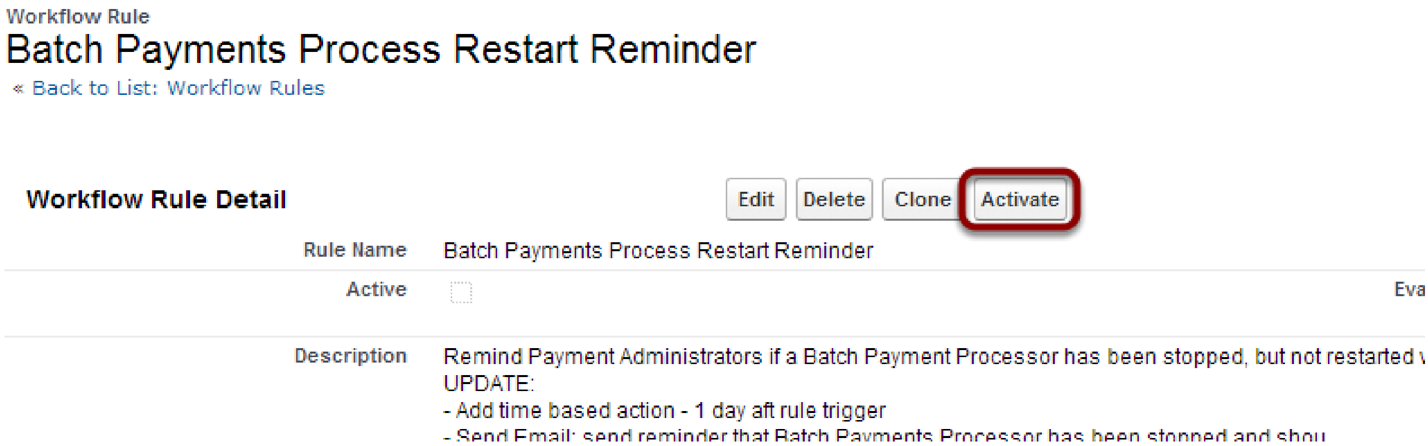
7.2 Add chosen Admin User to receive email notification and 'Save'



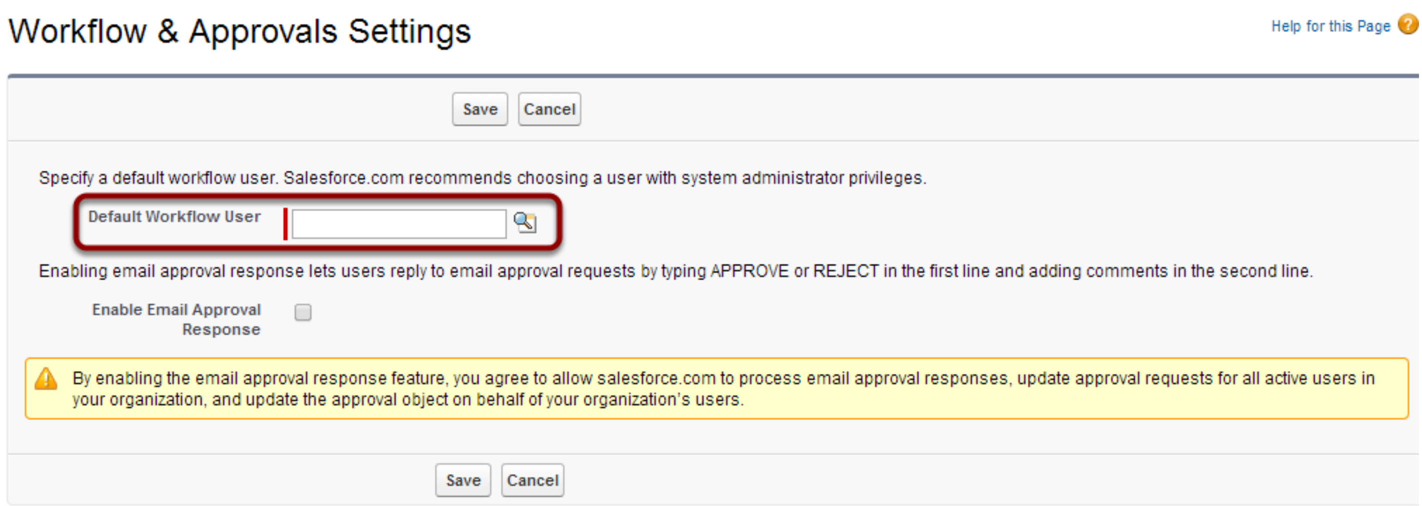
8. Select 'Done' button to complete the workflow rule



8.1 Select 'Activate' to begin the workflow process



8.2 Set 'Default Workflow User' and Save



If a Default Workflow User has already been set, this step will be skipped.

How to set up the batch payments process not running notification

The Batch Payment Processor is started from the “Start” button on the Merchant Facility and processes new transactions every 10 minutes. This workflow is used to notify if the Batch Payments Processor has been started, but for some reason is no longer working. This scenario should never happen, but sometimes can be caused by Salesforce.com maintenance.

If the Recurring Payment Processor is running, it will do daily checks to ensure the Batch Processor is running if it should be running. These checks should reduce the need to have this workflow reminder rule setup.

Quick Steps:

1. Clone Workflow rule " Batch Payment Processor Not Running [ADD TIME BASED WORKFLOW]" and rename to "Batch Payment Processor Not Running"
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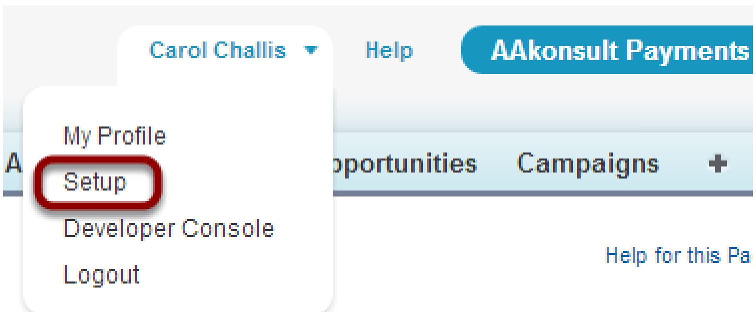
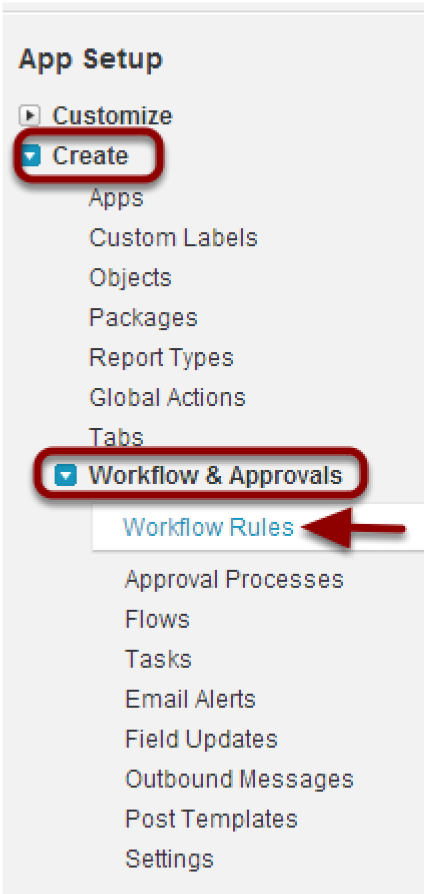


Select 'Workflow Rules'



Read about Workflows and select 'Continue'

Understanding Workflow

Help for this Page

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Continue

This page can be turned off.

Scroll down and select 'Batch Payments Processor Not Running [ADD TIME BASED WORKFLOW]'

Edit | Del | Activate	2nd Renewal Reminder	UPDATE: Add Time Based Workflow, 10 days after Subscı - Email Alert: send 2nd Renewal Reminder Ema Keep in mind Automatic Renewals
Edit | Activate	2nd Renewal Reminder [ADD TIME BASED WORKFLOW]	Email Contact a reminder that their subscription UPDATE: Add Time Based Workflow, 10 days after Subscı - Email Alert: send 2nd Renewal Reminder Ema Keep in mind Automatic Renewals
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Edit | Activate	Batch Payments Process Restart Reminder [ADD TIME BASED WORKFLOW]	Remind Payment Administrators if a Batch Payn within 24 hours. UPDATE: - Add time based action - 1 day aft rule trigger - Send Email: send reminder that Batch Paymer
Edit | Activate	Create Account URL Token	Sets Create URL Checkbox to trigger creation of Update the filter parameters for this workflow to URL Tokens are used for creating object specifi
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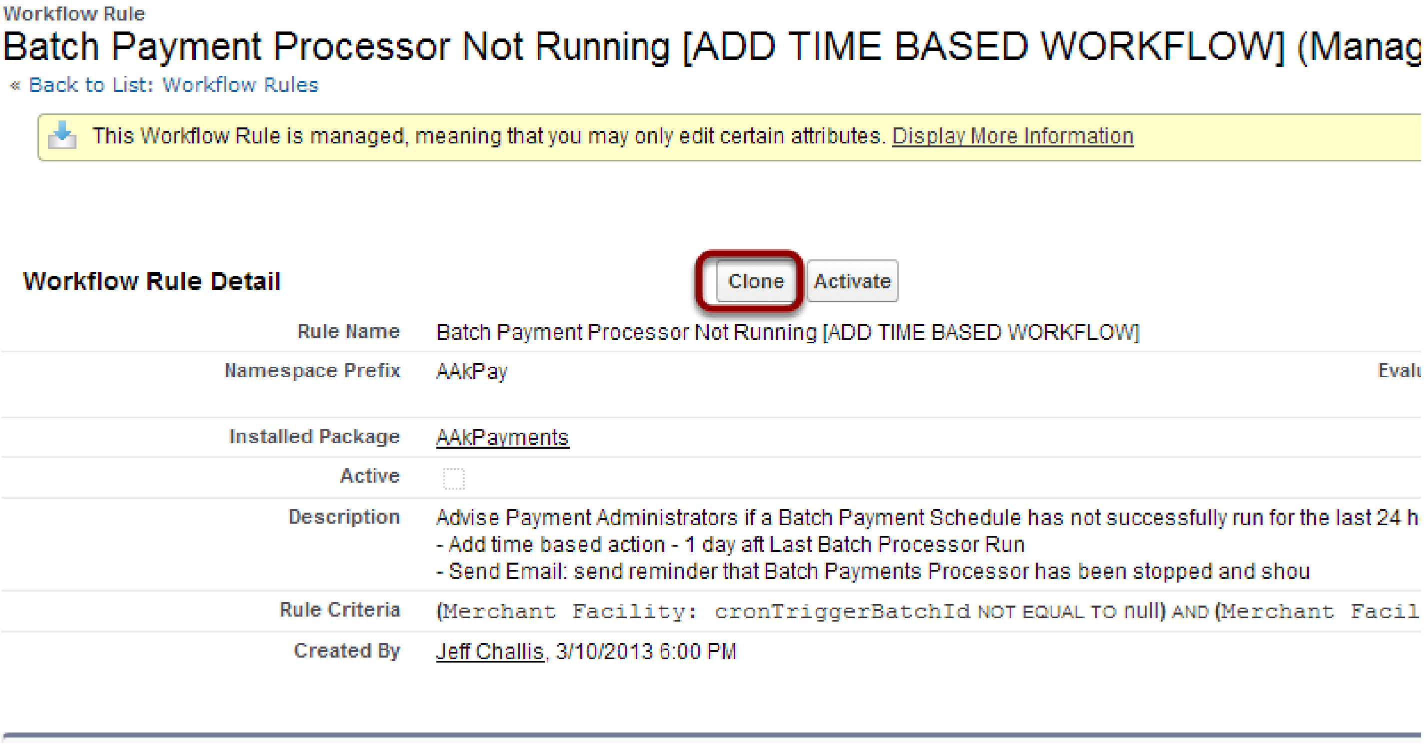
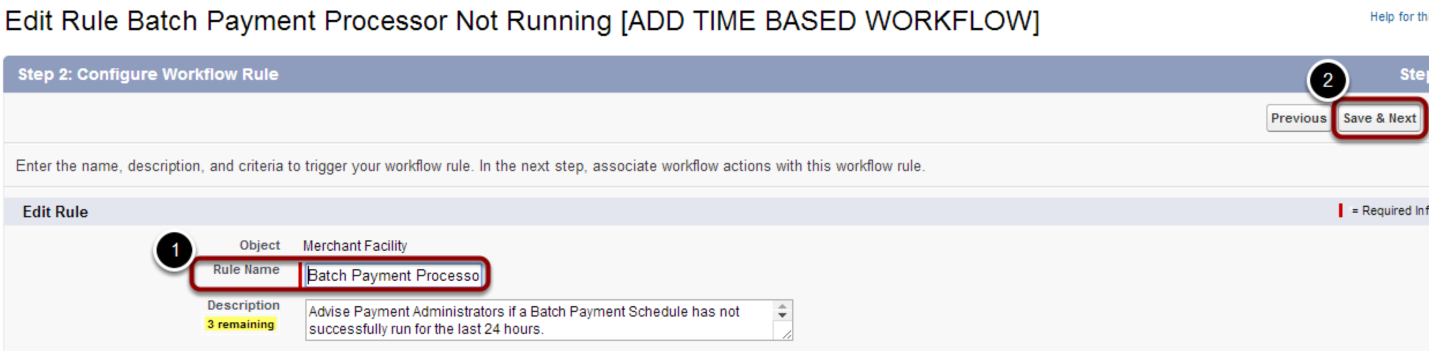
Edit | Activate	Create Case URL Token	Sets Create URL Checkbox to trigger creation of Update the filter parameters for this workflow to URL Tokens are used for creating object specifi

This may be located on the second page.

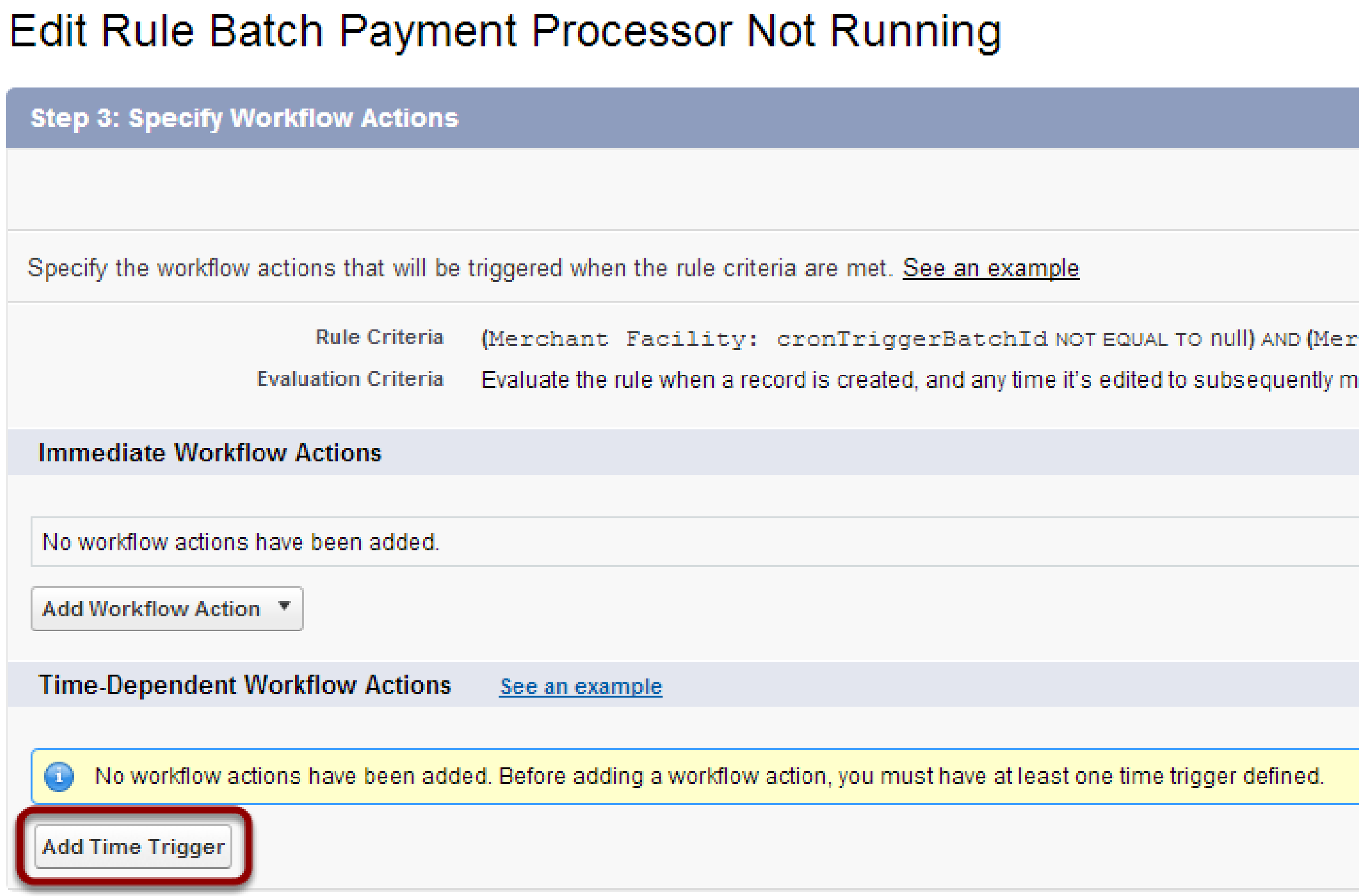
Select 'Clone'



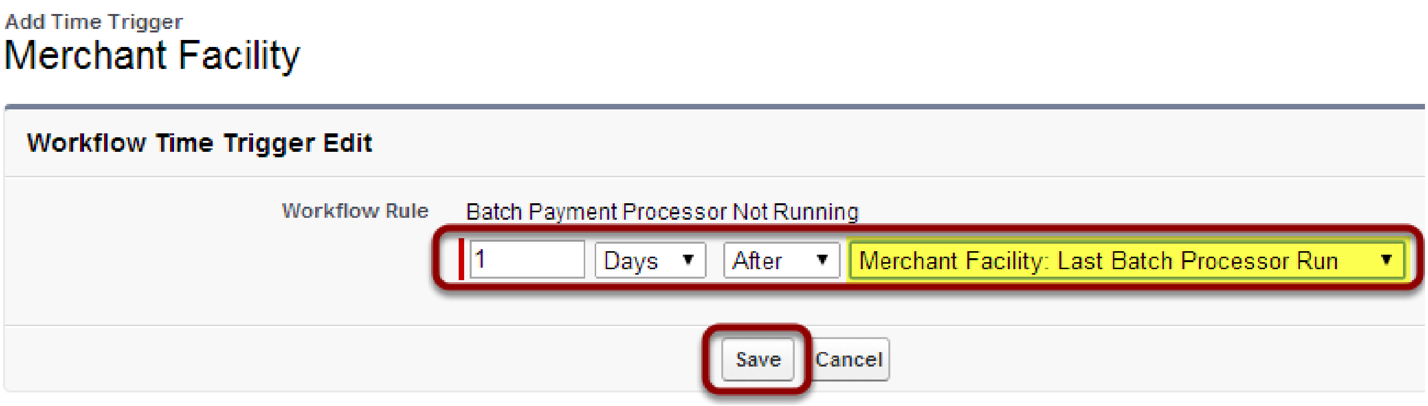
Re-name the workflow rule 'Batch Payment Processor Not Running' and select 'Save & Next'



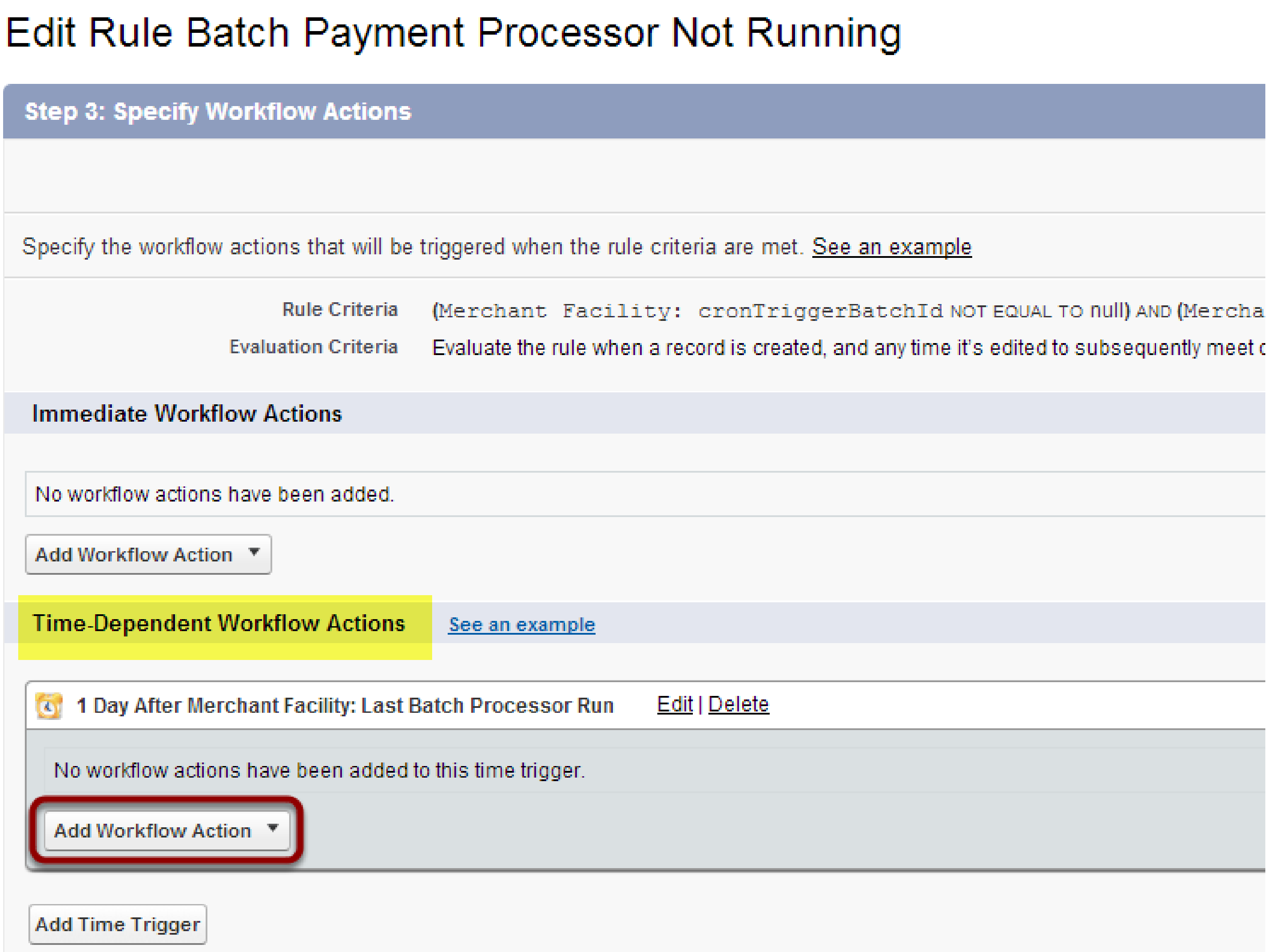
Select the 'Add Time Trigger' button



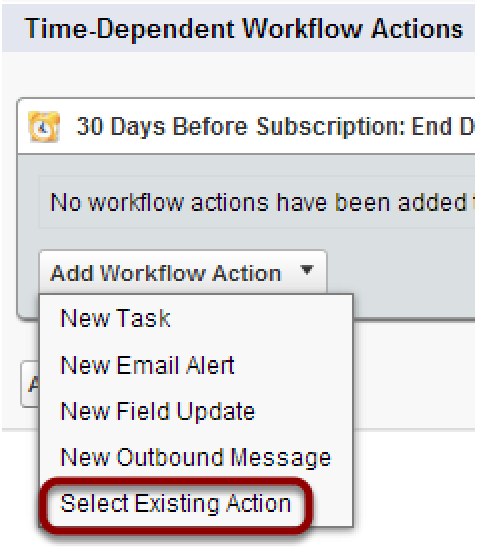
Set Time Trigger to '1 day after Last Batch Processor Run' and 'Save'



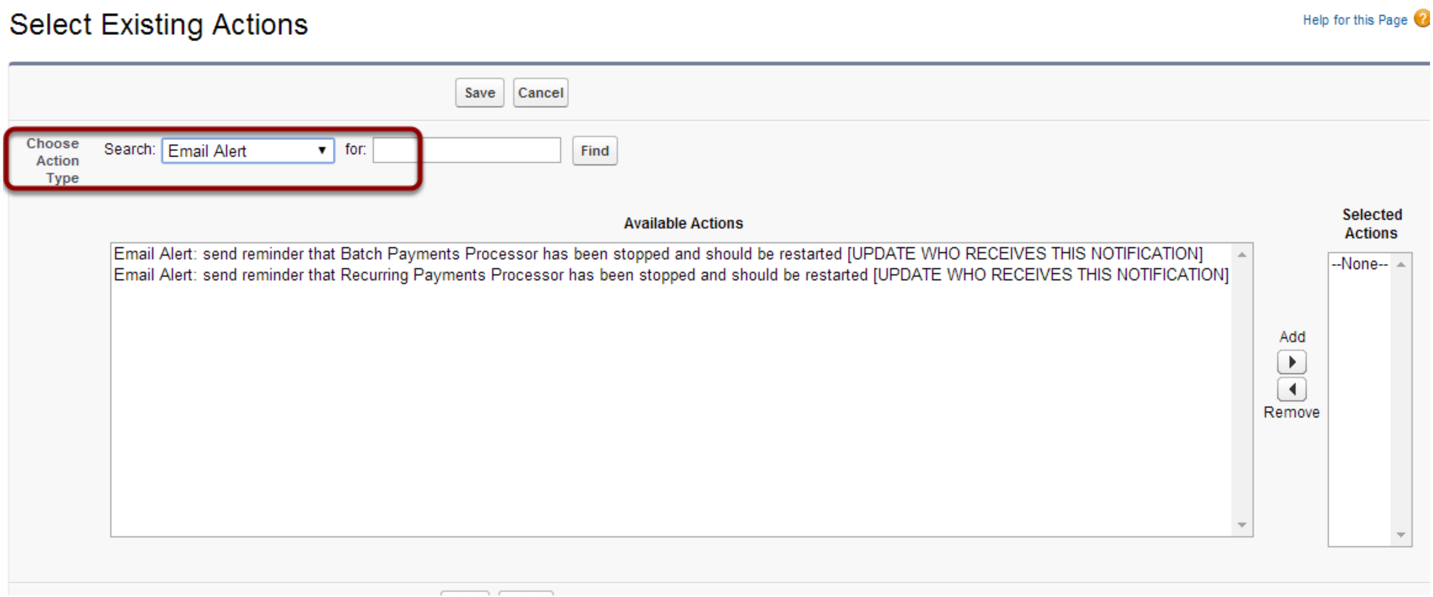
Select the 'Add Workflow Action' button in the Time Dependent Workflow Action section.



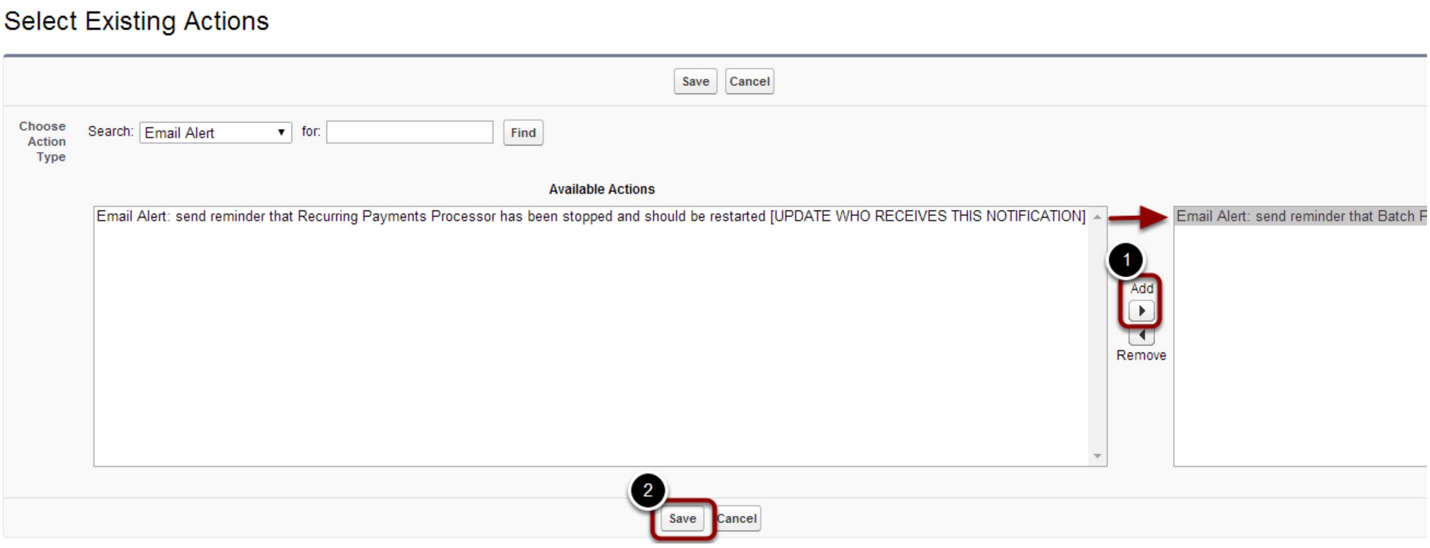
Select 'Select Existing Action from the drop down menu



Select 'Email Alert' from the Choose Action Type drop down menu

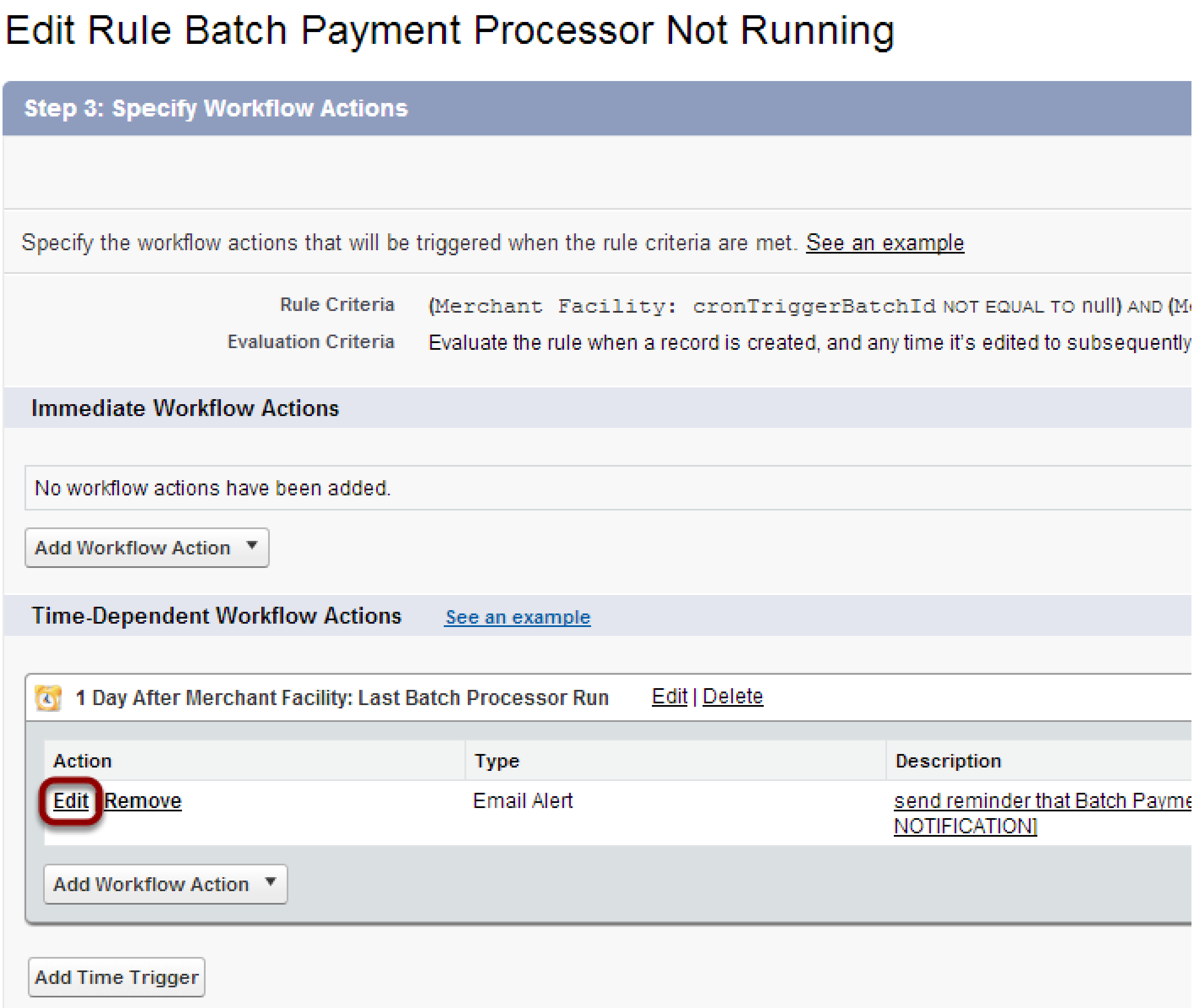


Add 'Email Alert: send reminder that Batch Payments Processor has been stopped and should be restarted …' and 'Save'

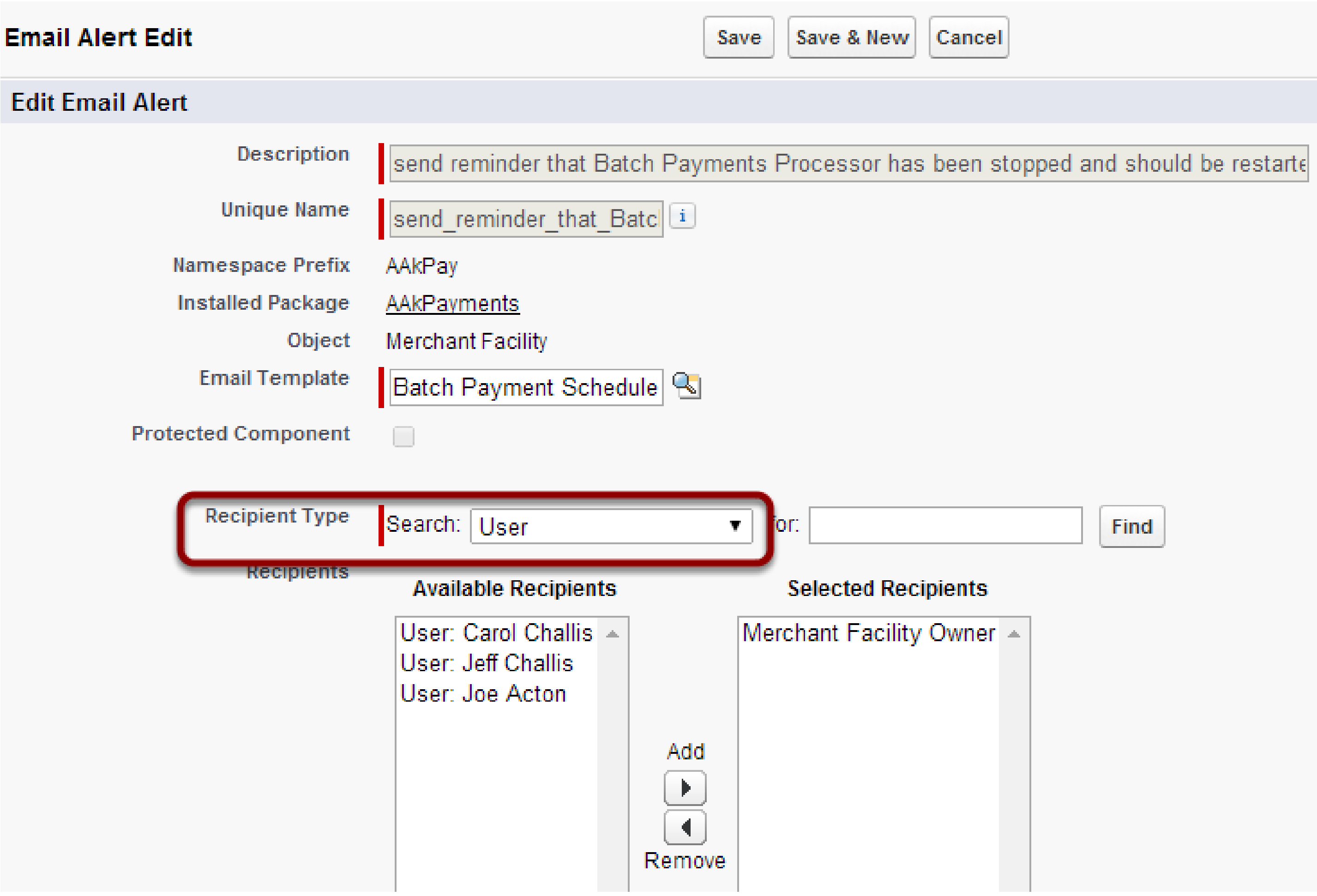


Scroll across image to see actions.

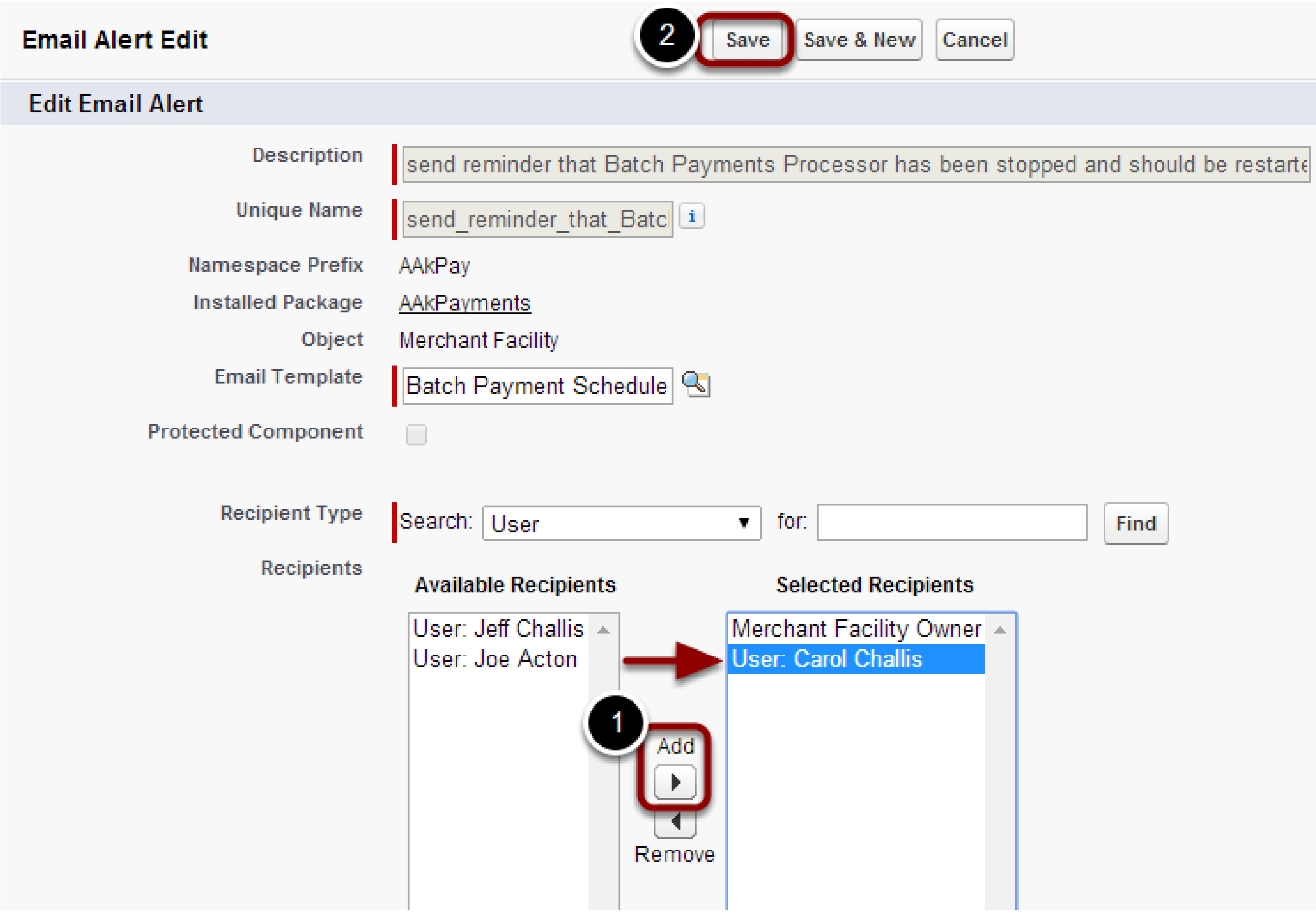
Select 'Edit' on the Actions list for the new rule



Select 'User' from the 'Recipient Type' drop down list

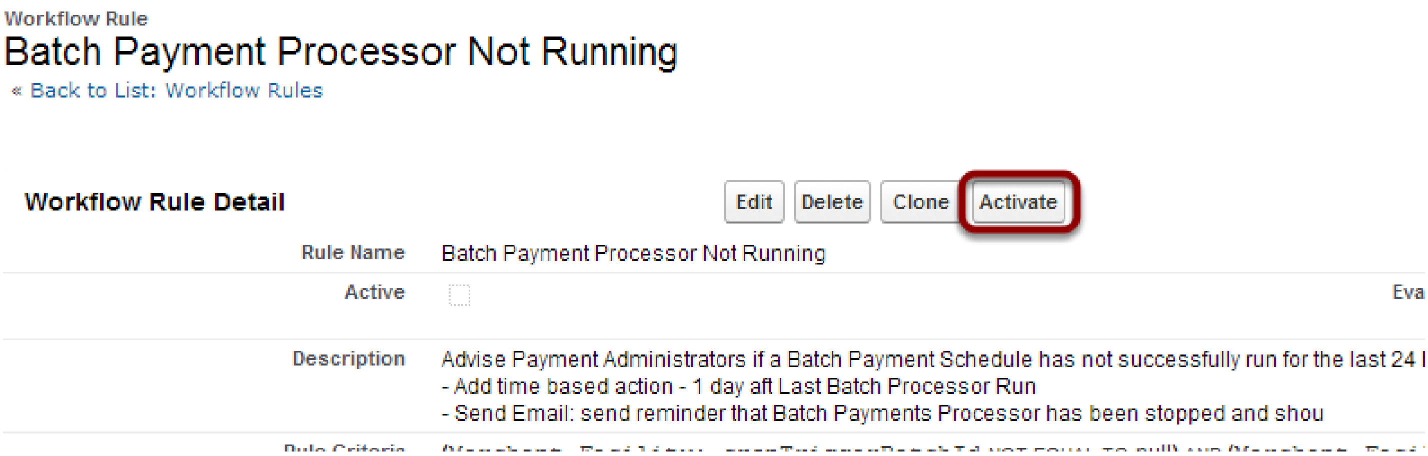


Add chosen Admin User to receive email notification and 'Save'

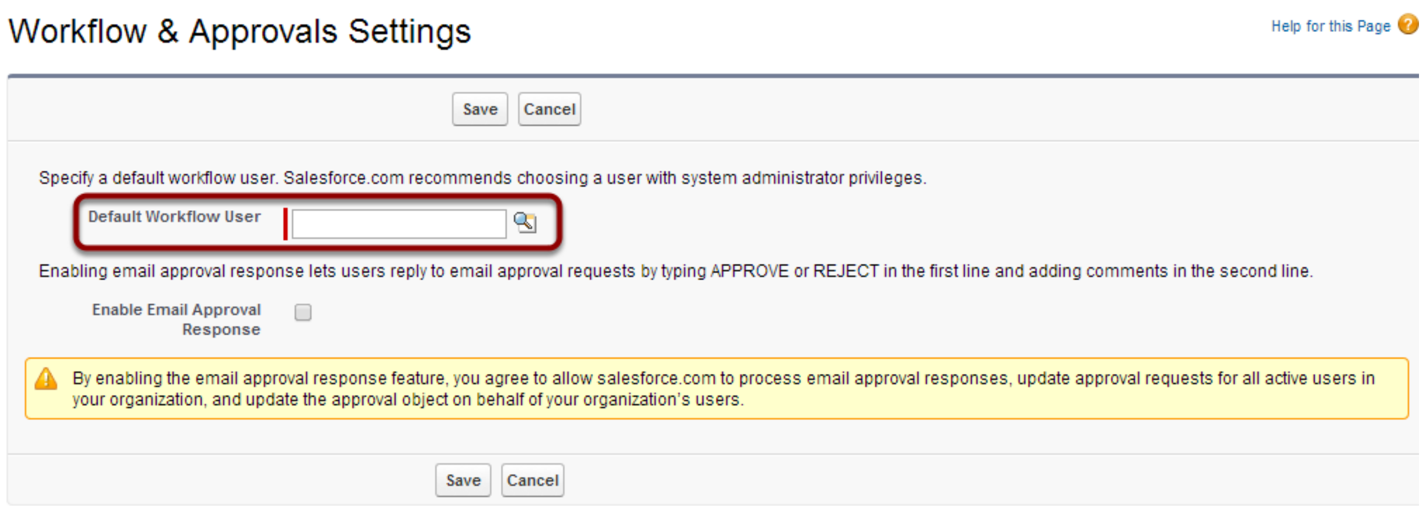


Select 'Done' button to complete the workflow rule

Select 'Activate' to begin the workflow process



Set 'Default Workflow User' and Save



If a Default Workflow User has already been set, this step will be skipped.

How to activate Refund approvals

AAkonsult Payments comes with a basic approval process for refunds. By default, refund approvals process is not enabled and this procedure walks you through how you can do this.

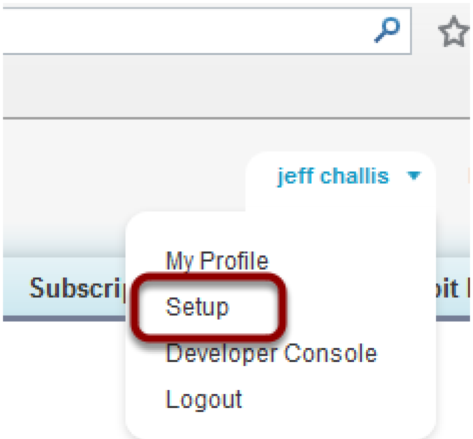
If you wish to have multi-level and more advanced approvals, you can setup Approval Workflows to do this. The final approval step simply needs to do a field update that checks the "Approved" checkbox on the Payment Txn. For setting up Approval workflows, please consult the Salesforce online help, or alternatively just use the more simpler version enabled in this procedure.

For organisations wanting to use Refund Approval Processes, we recommend you review the internal security setup procedure. You need to ensure that only approvals have update access to the Approval field on the Payment Txn Object.

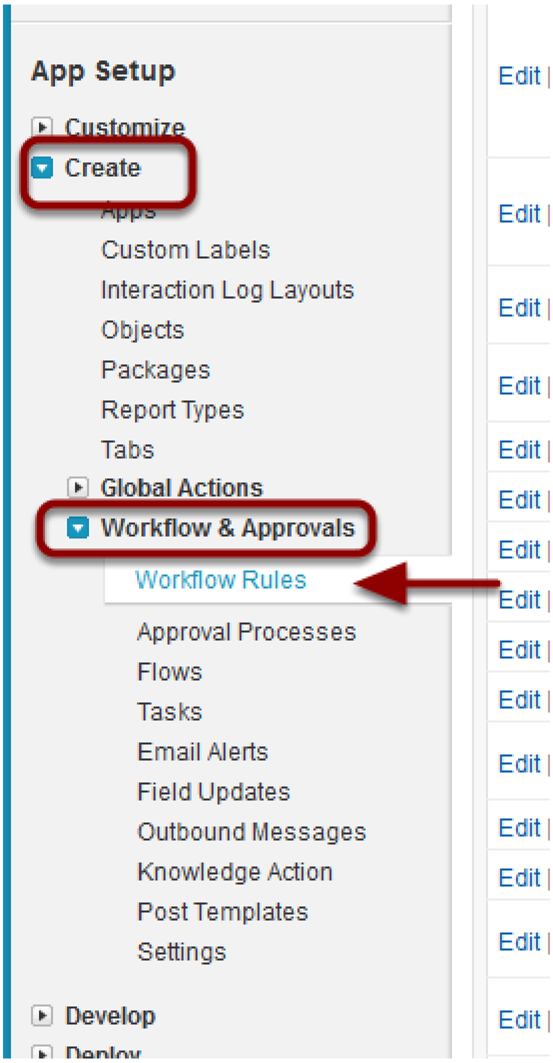
Quick Steps:

1. Locate workflow: Refund Approval
2. Update the recipient of the workflow email
3. Enable this workflow

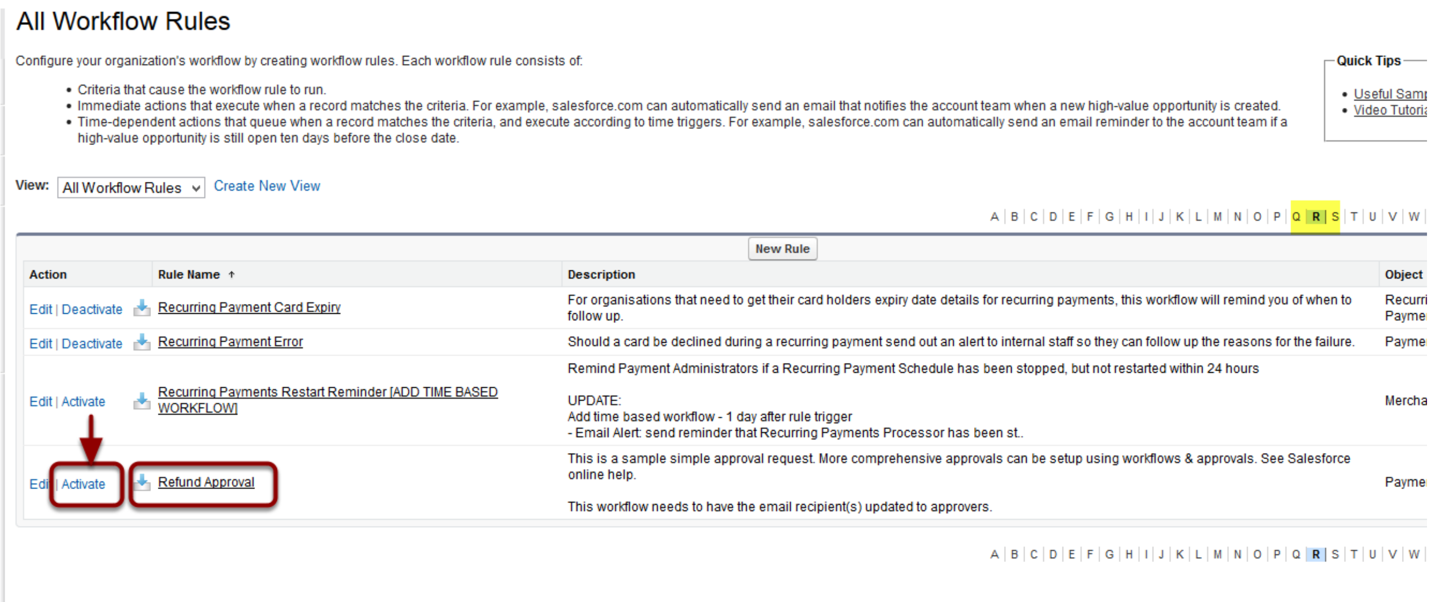
1. Navigate to Setup > App Setup > Create > Workflow & Approvals > Workflow Rules



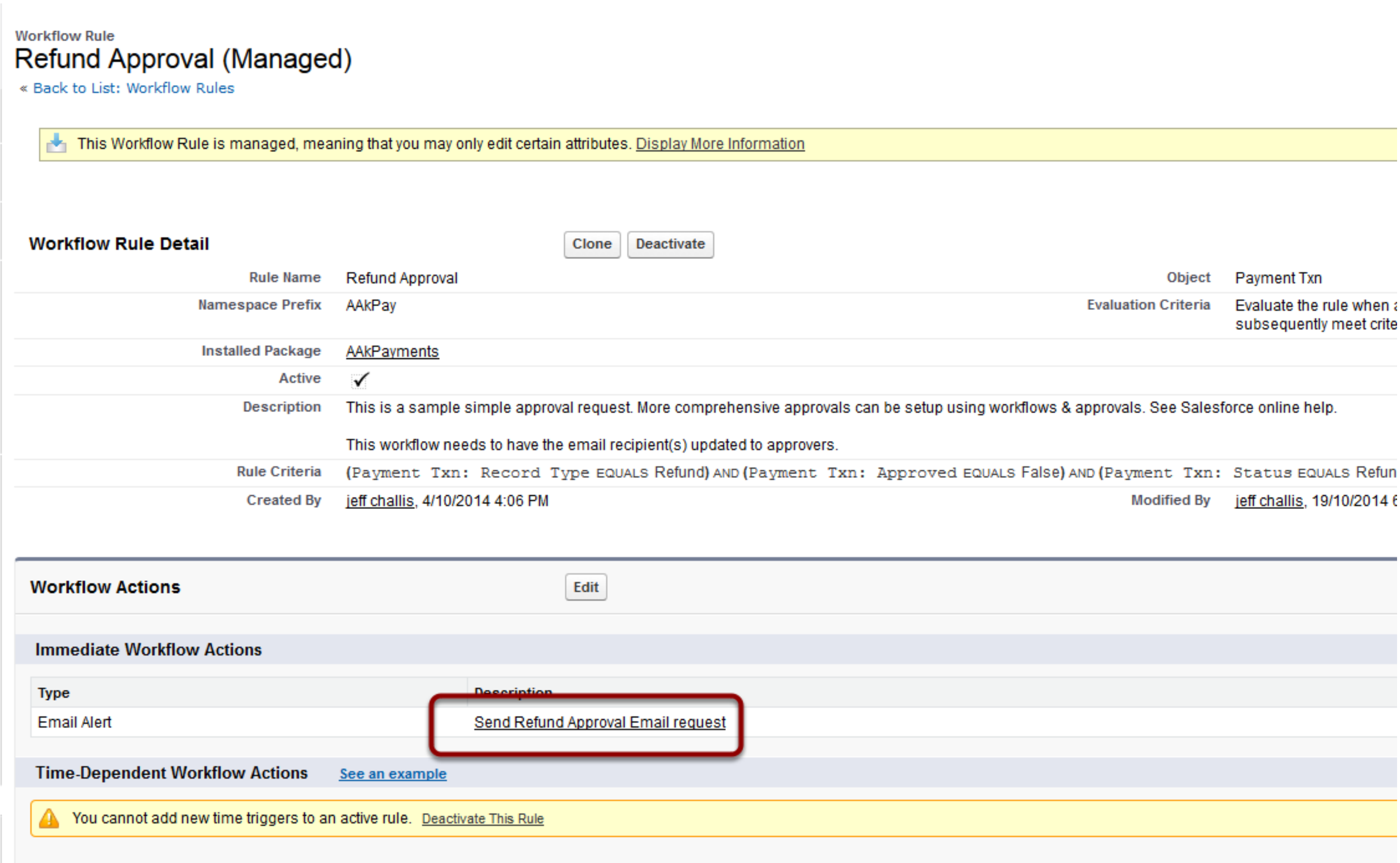
2. Select 'Workflow Rules'



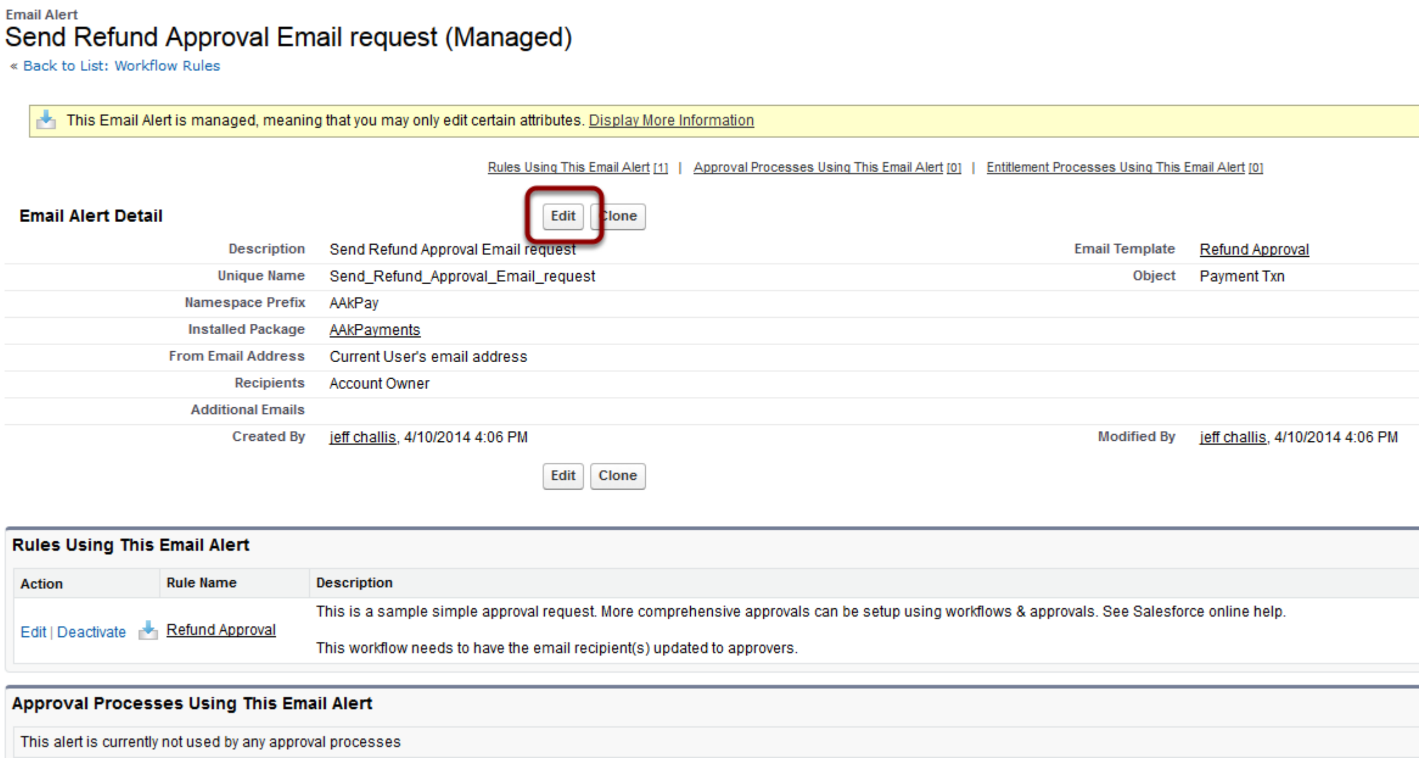
3. Use the alphabetical look-up to find 'Refund Approval', and Activate



4. Click into the Refund Workflow Approval and into the Email Alert



5. Edit the Email Alert - Send Refund Approval Email request



Email Alert

Send Refund Approval Email request (Managed)

« Back to List: Workflow Rules

This Email Alert is managed, meaning that you may only edit certain attributes. Display More Information

Rules Using This Email Alert [1] | Approval Processes Using This Email Alert [0] | Entitlement Processes Using This Email Alert [0]

Email Alert Detail Edit Clone

Description	Send Refund Approval Email request	Email Template	Refund Approval
Unique Name	Send_Refund_Approval_Email_request	Object	Payment Txn
Namespace Prefix	AAkPay		
Installed Package	AAkPayments		
From Email Address	Current User's email address		
Recipients	Account Owner		
Additional Emails			
Created By	jeff challis, 4/10/2014 4:06 PM	Modified By	jeff challis, 4/10/2014 4:06 PM

Edit Clone

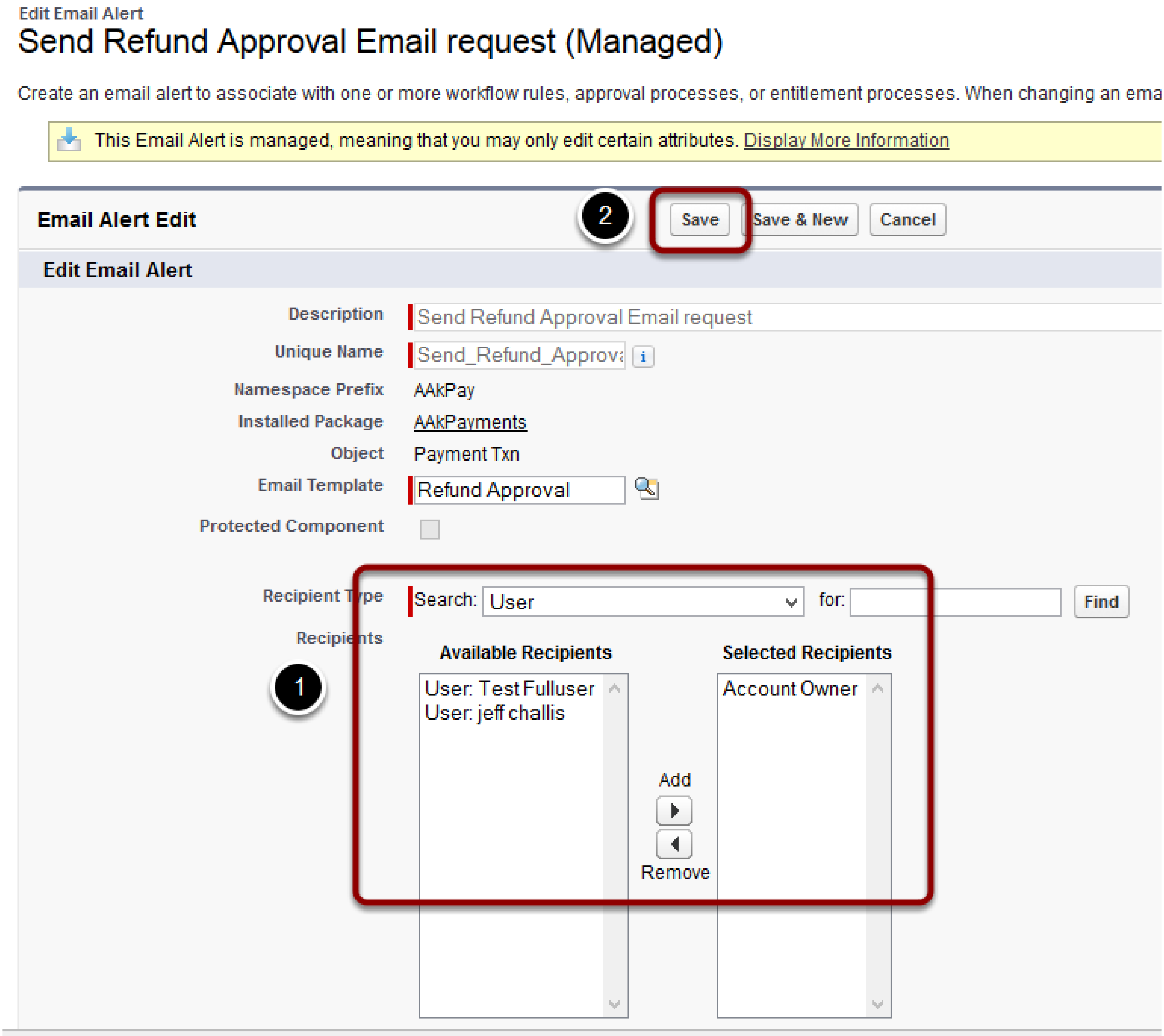
Rules Using This Email Alert

Action	Rule Name	Description
Edit | Deactivate	Refund Approval	This is a sample simple approval request. More comprehensive approvals can be setup using workflows & approvals. See Salesforce online help. This workflow needs to have the email recipient(s) updated to approvers.

Approval Processes Using This Email Alert

This alert is currently not used by any approval processes

6. Update the recipient(s) and Save



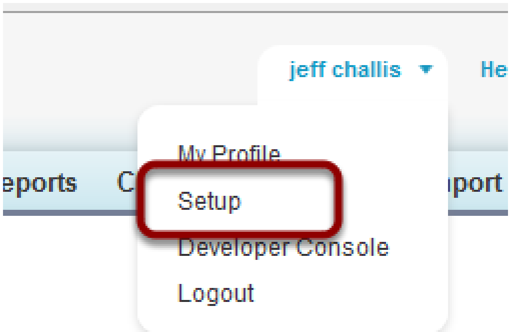
How to activate New Online Payment Notification

Turn this workflow on if you wish to be notified of all new online payments (exception memberships).

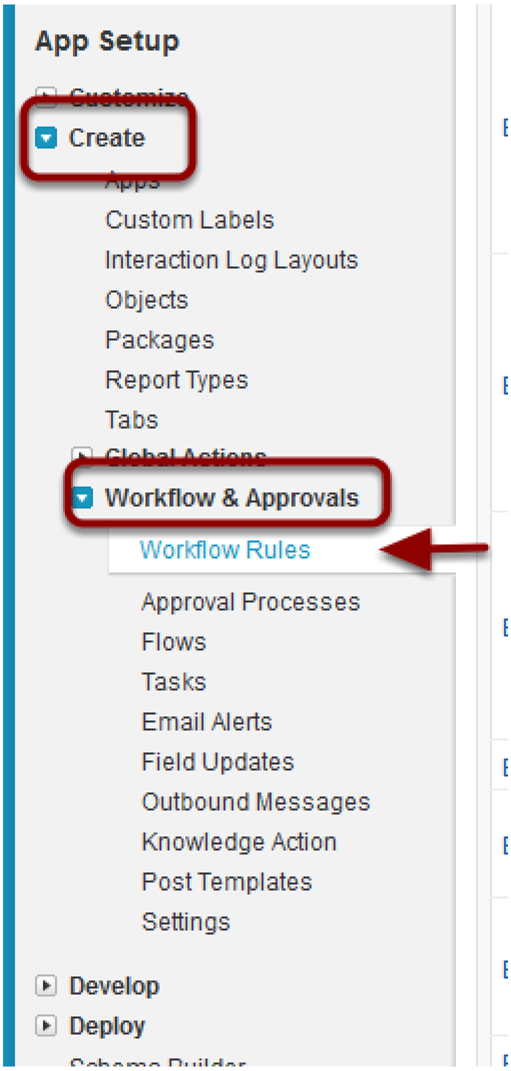
Quick Steps:

1. Locate workflow: New Online Payment Notification
2. Update the recipient of the workflow email
3. Enable this workflow

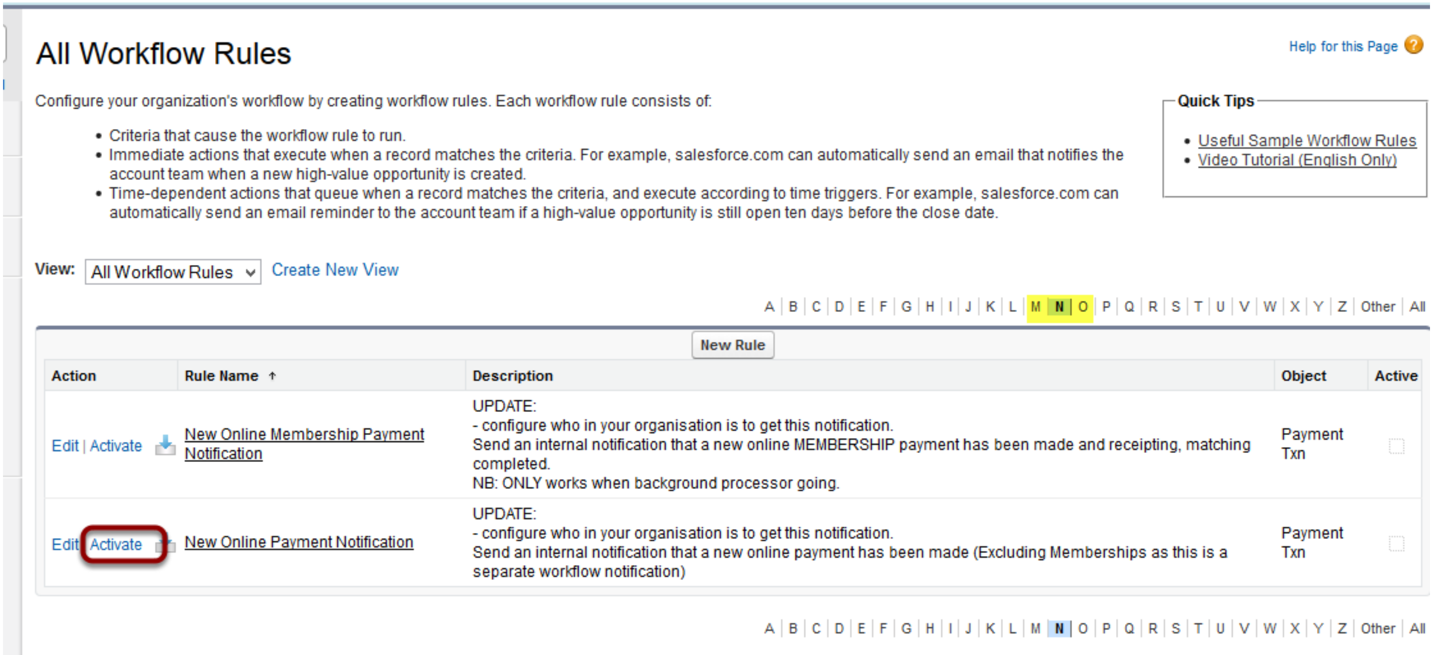
1. Navigate to Setup > App Setup > Create > Workflow & Approvals > Workflow Rules



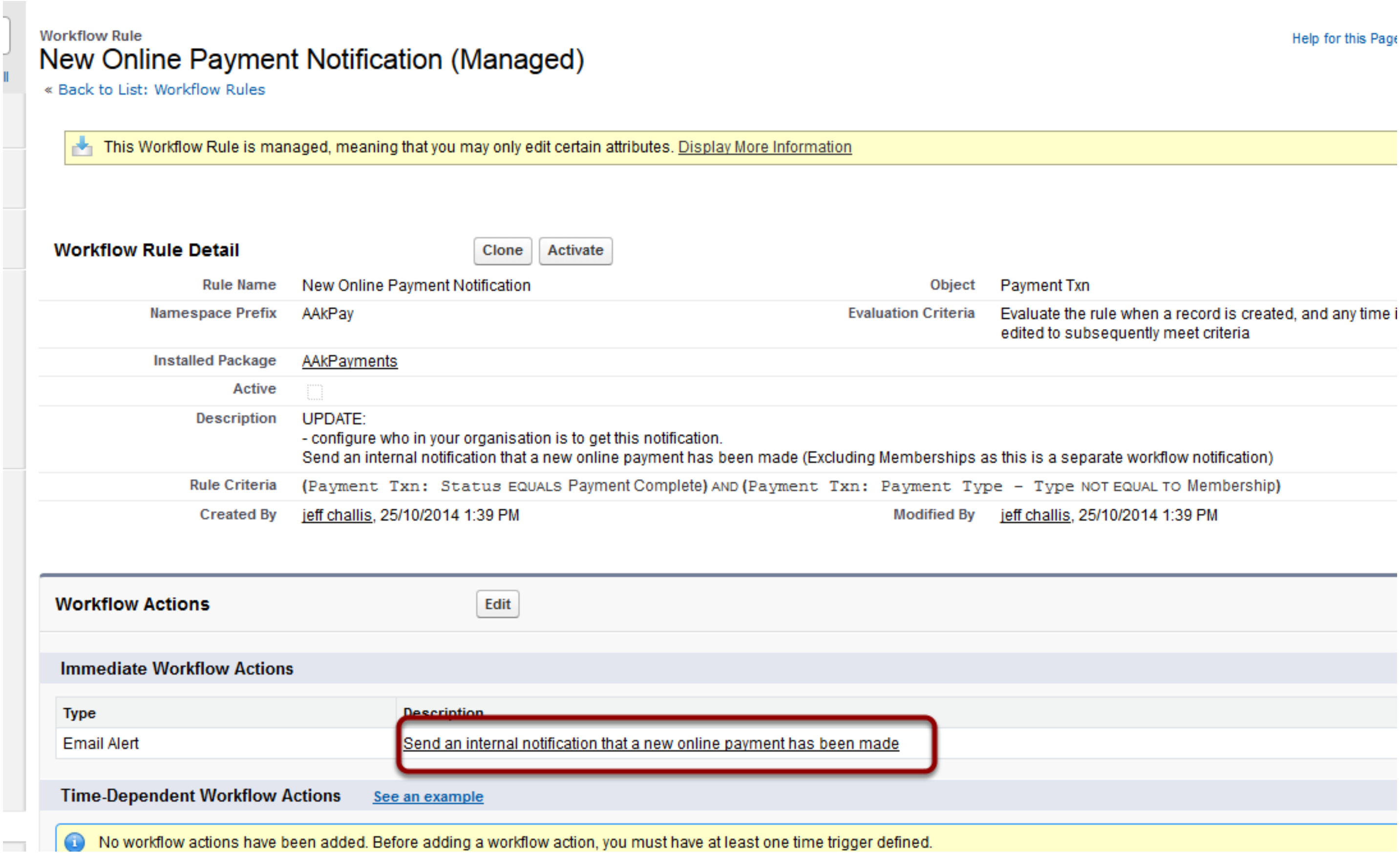
2. Select 'Workflow Rules'



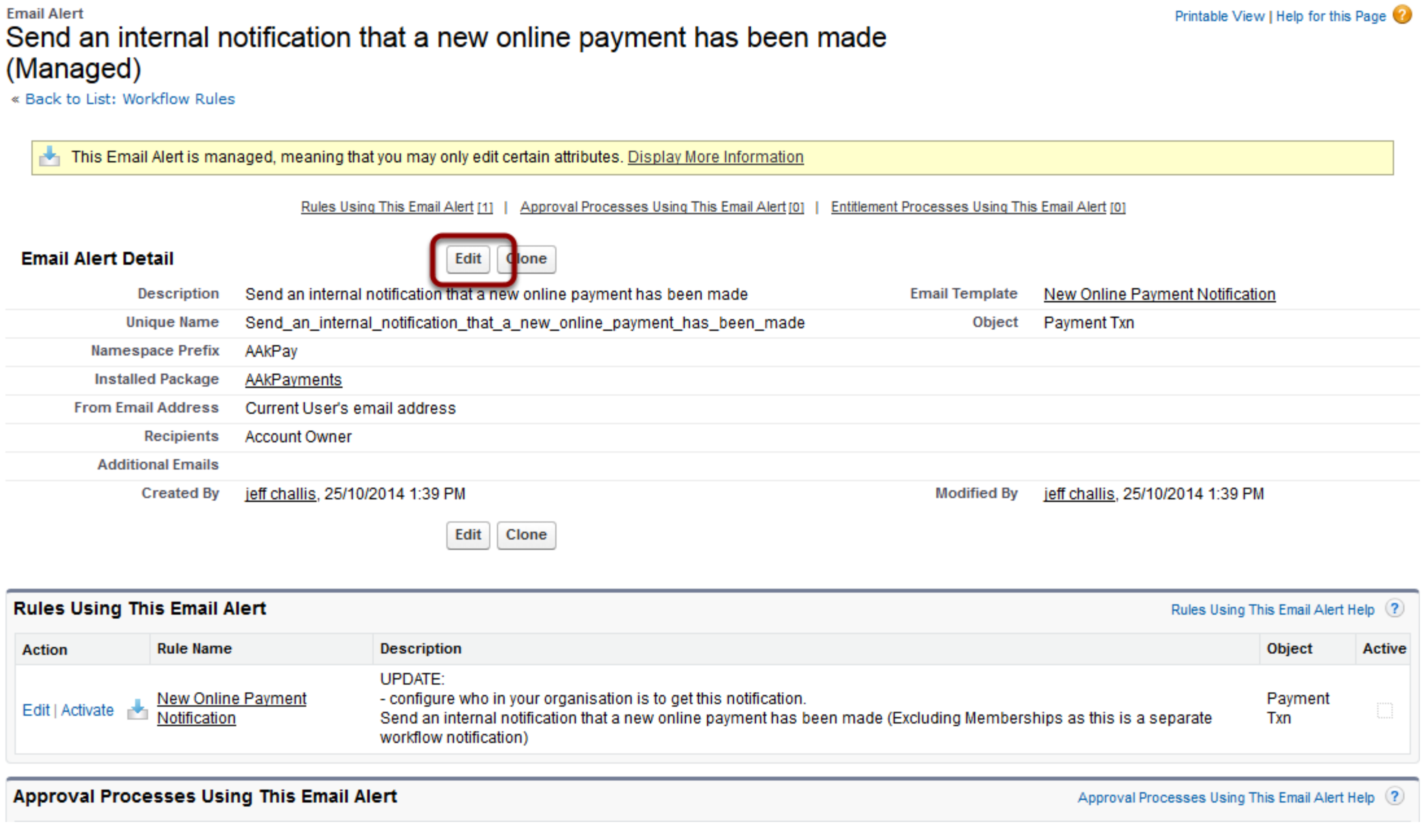
3. Use the alphabetical look-up to find 'New Online Payment Notification', and Activate



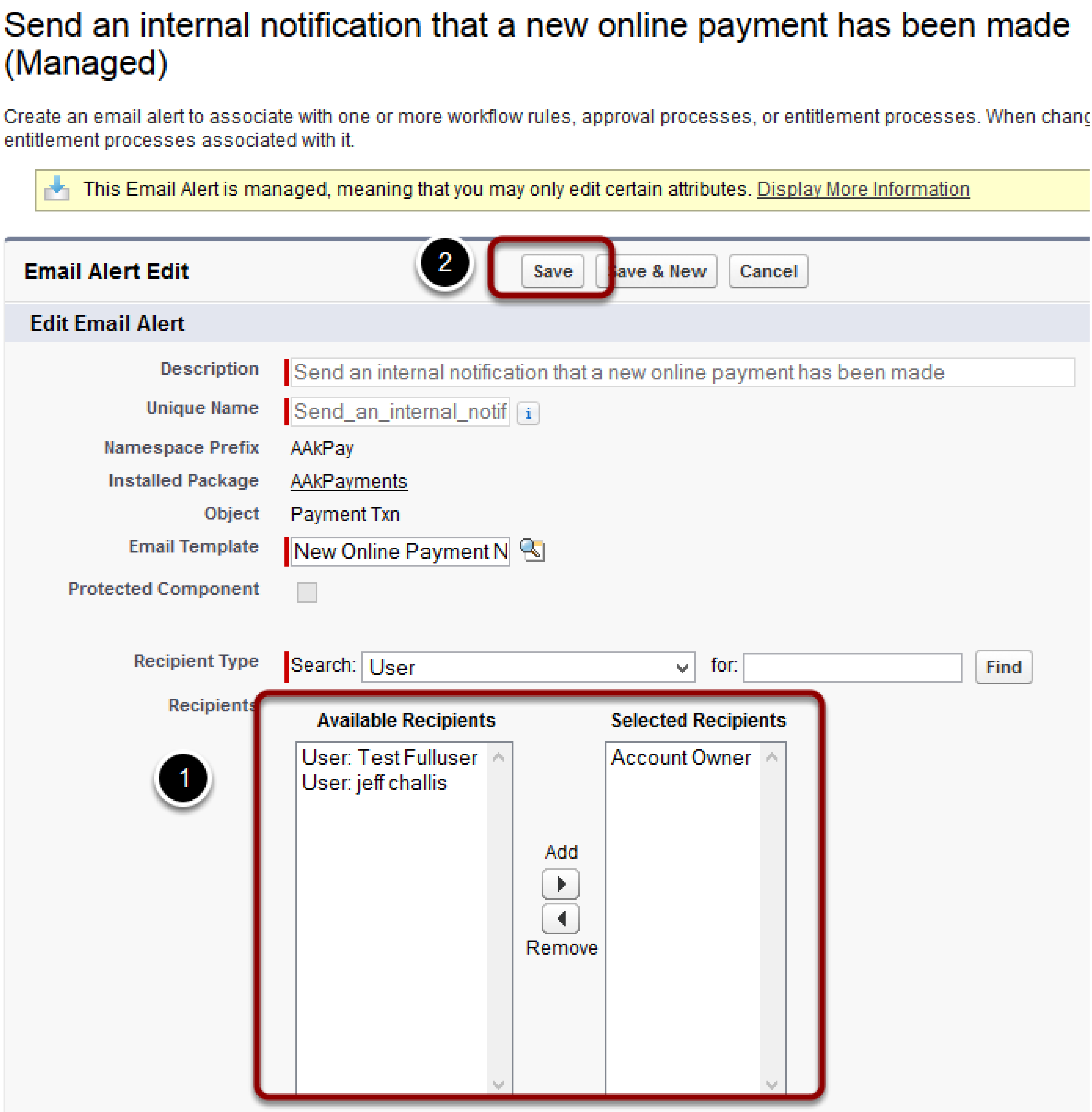
4. Click into the New Online Payment Notification and into the Email Alert



5. Edit the Email Alert - Send Send an internal notification that a new online payment has been made



6. Update the recipient(s) and Save



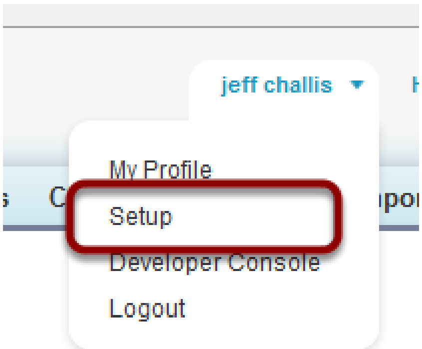
How to activate New Online Membership Payment Notification

Turn this workflow on if you wish to be notified of all new Membership/Subscription Payments are made.

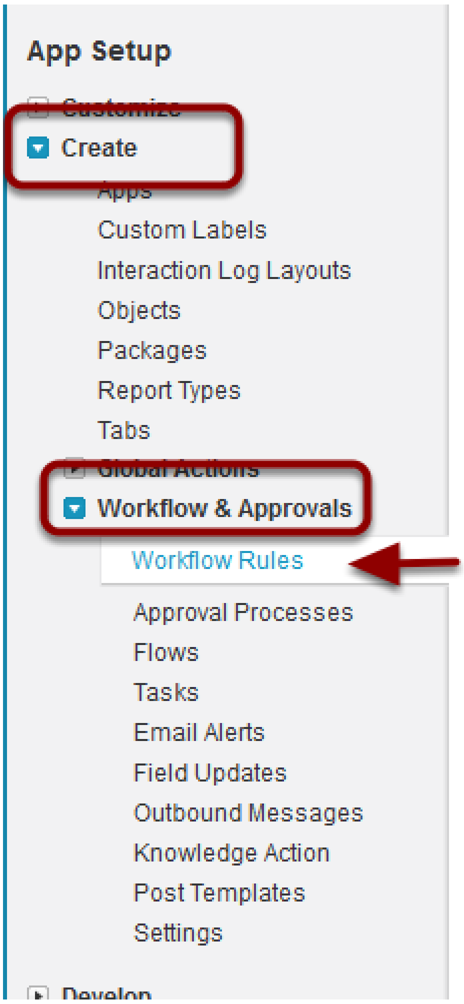
Quick Steps:

1. Locate workflow: New Online Membership Payment Notification
2. Update the recipient of the workflow email
3. Enable this workflow

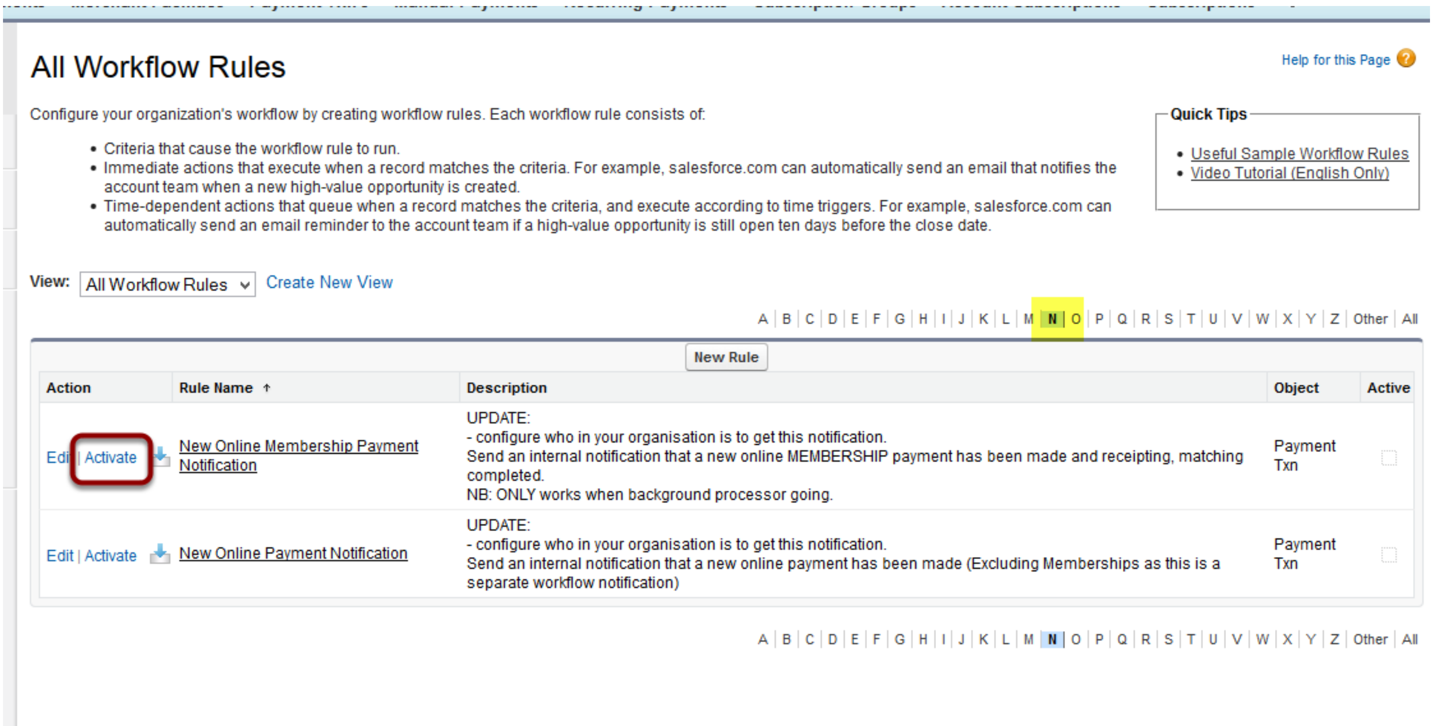
1. Navigate to Setup > App Setup > Create > Workflow & Approvals > Workflow Rules



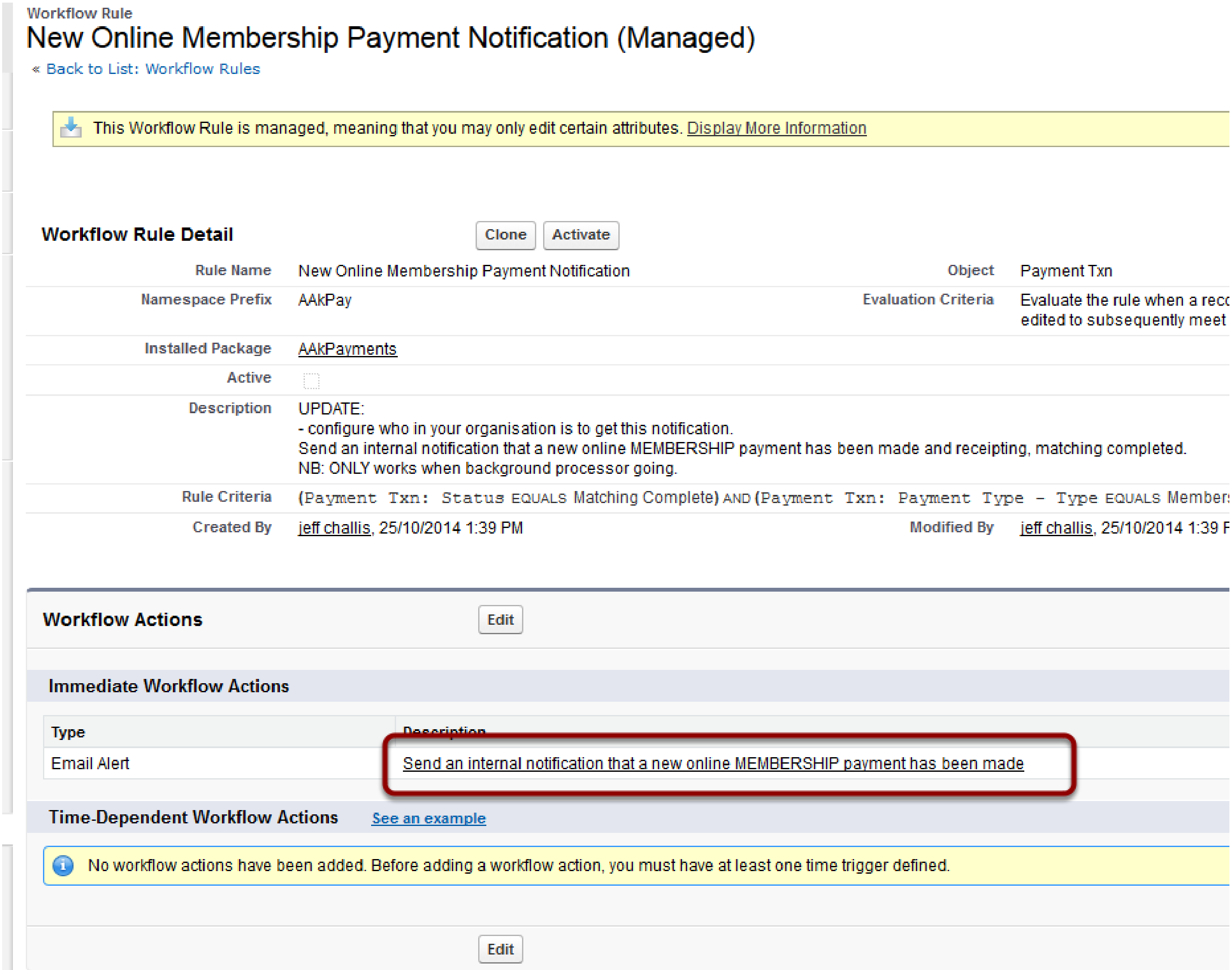
2. Select 'Workflow Rules'



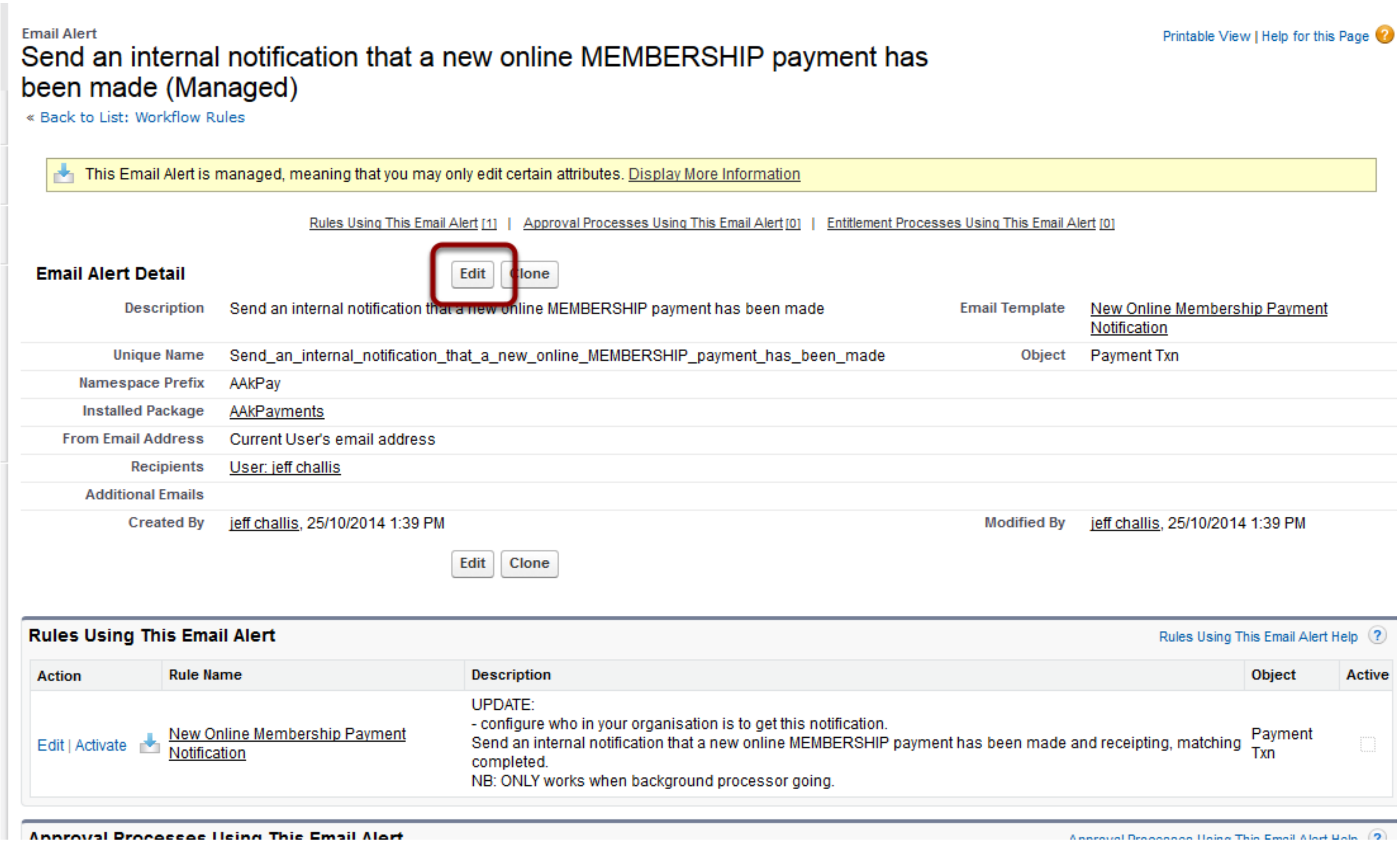
3. Use the alphabetical look-up to find 'New Online Membership Payment Notification', and Activate



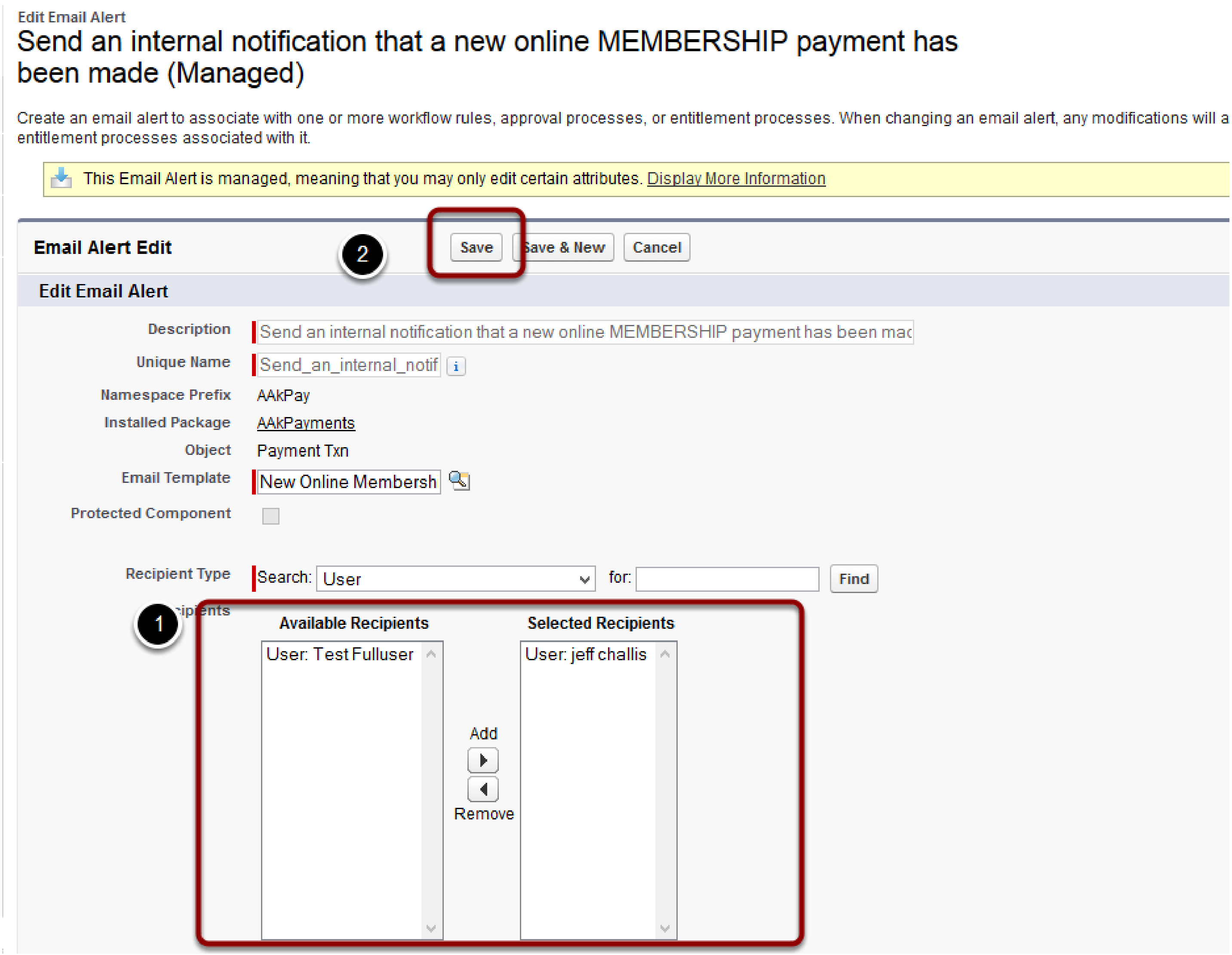
4. Click into the New Online Membership Payment Notification and into the Email Alert



5. Edit the Email Alert - Send an internal notification that a new online MEMBERSHIP payment has been made



6. Update the recipient(s) and Save



Buttons - Optional

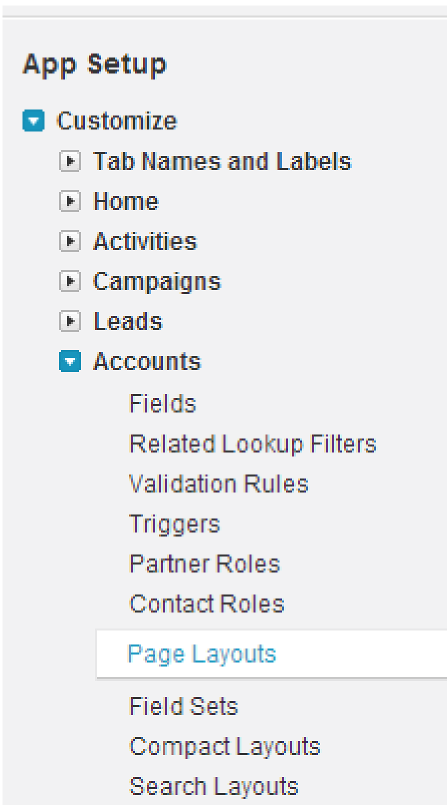
How to create a button on the Accounts tab

Cash, Cheque, Money Orders and Credit Card payment buttons are available for Accounts, Contacts, Opportunities and Campaign Member tabs. For other objects and custom objects, custom buttons can be created by administrators. To see how to do this, please see the salesforce.com online help.

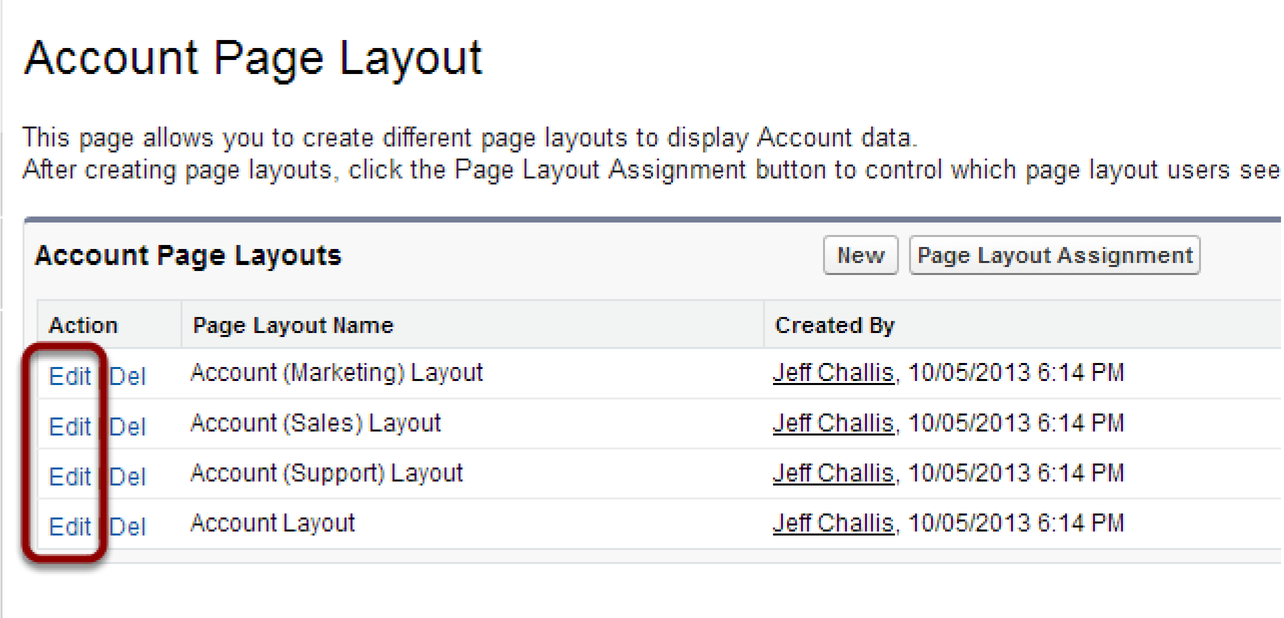
Quick Steps:

1. Edit the Account Page Layout and drag/drop the following buttons onto the Page Layout
   Credit Card Payment Button - To launch the Credit Card payment/checkout form and link the transaction with the account (Optionally, you can set this to include Manual Payments as well)
   Manual Payment Button - To launch the Manual Payment form and pre-fill/link with Account Details.
   Make Payment Button - Enables Credit Card Payment or Manual Payment. Also allows for selection of merchant facility and payment form, plus allows for token charge payments and membership/subscription renewal payments.

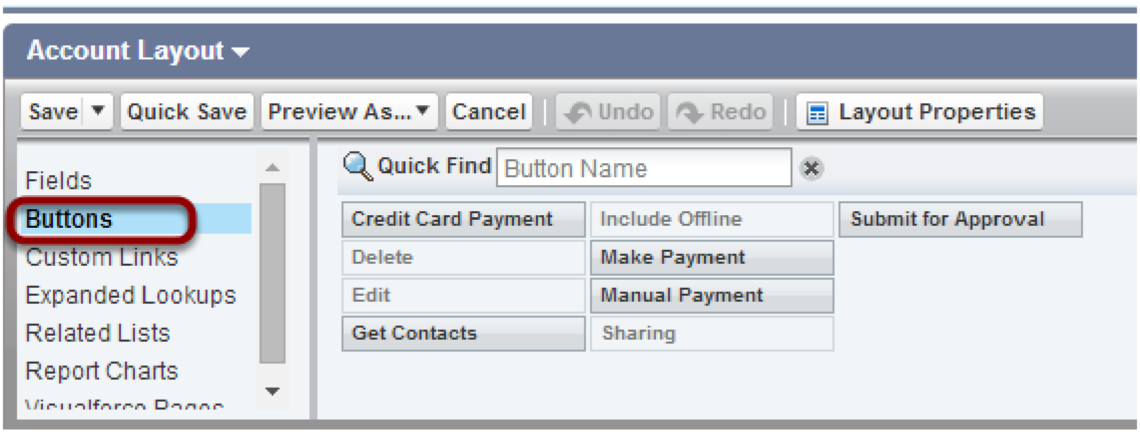
1. Navigate to Setup > App Setup > Customize > Accounts > Page Layouts



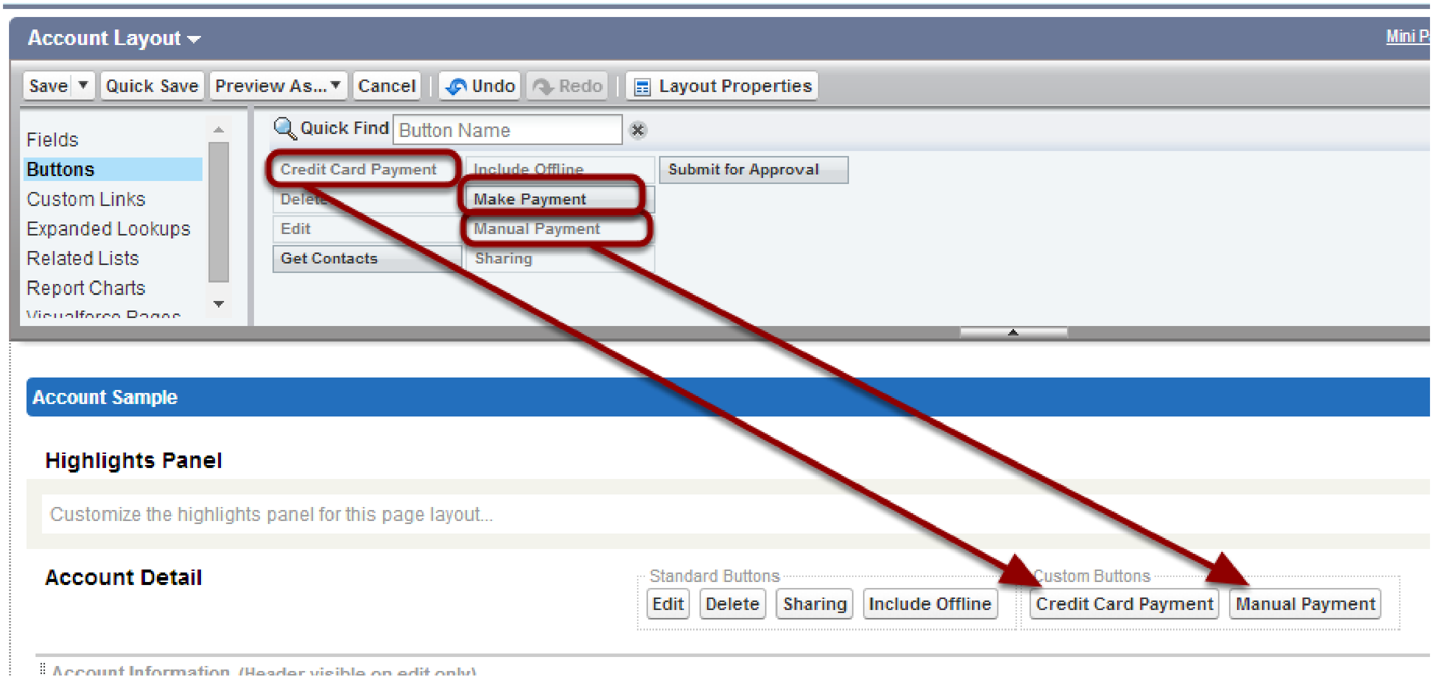
2. Select 'Edit' next to the page layout that you would like to add the buttons to



3. Select 'Buttons' from the list under 'Fields'

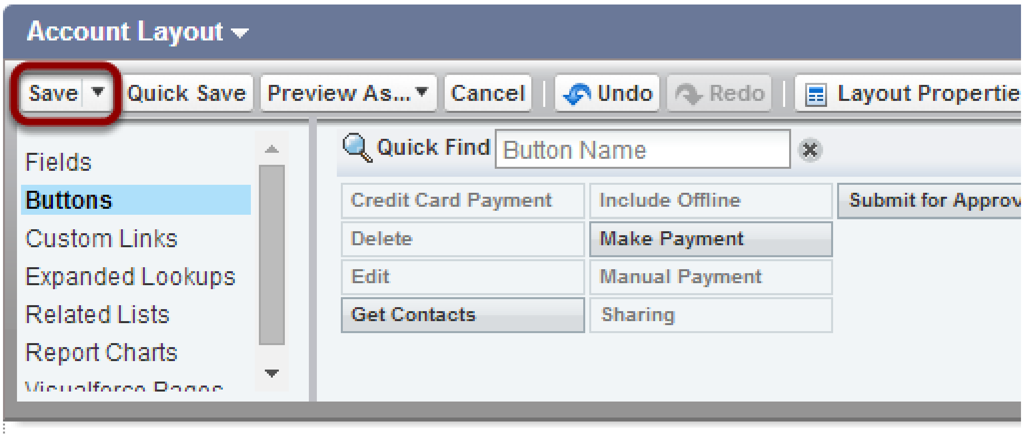


4. Drop & drag the 'Credit Card Payment' and 'Manual Payment' buttons onto the page layout



You can choose buttons to suit.

5. Save



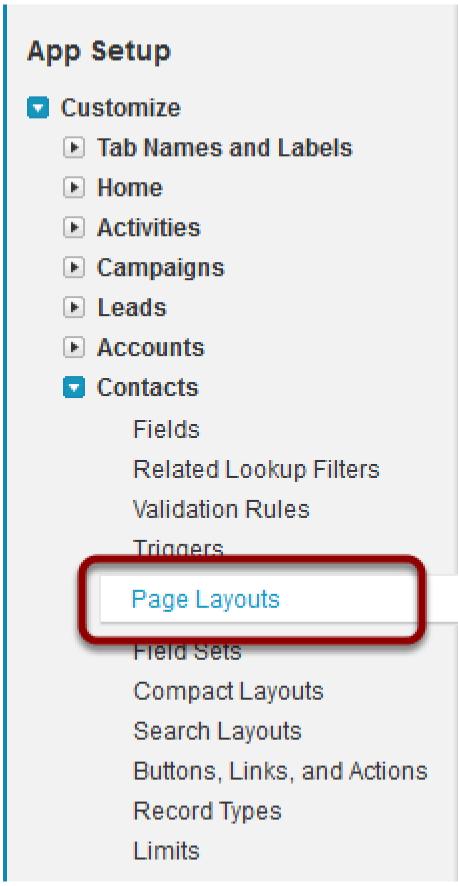
How to create a button on the Contacts tab

Cash, Cheque, Money Orders and Credit Card payment buttons are available for Accounts, Contacts, Opportunities and Campaign Member tabs. For other objects and custom objects, custom buttons can be created by administrators. To see how to do this, please see the salesforce.com online help.

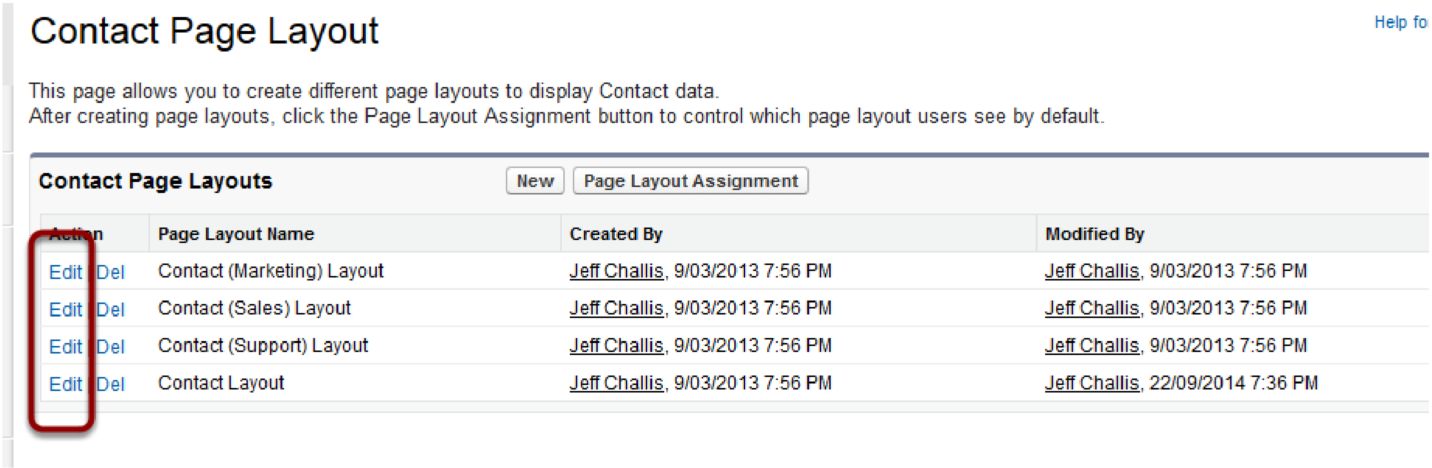
Quick Steps:

1. Edit the Contact Page Layout and drag/drop the following buttons onto the Page Layout
   Credit Card Payment Button - To launch the Credit Card payment/checkout form and link the transaction with the Contact (Optionally, you can set this to include Manual Payments as well)
   Manual Payment Button - To launch the Manual Payment form and pre-fill/link with Contact Details.
   Make Payment Button - Enables Credit Card Payment or Manual Payment. Also allows for selection of merchant facility and payment form, plus allows for token charge payments and membership/subscription renewal payments.
   Annual Statement Button - Generates a statement for all transactions relating to the Contacts - Account for the last financial year.

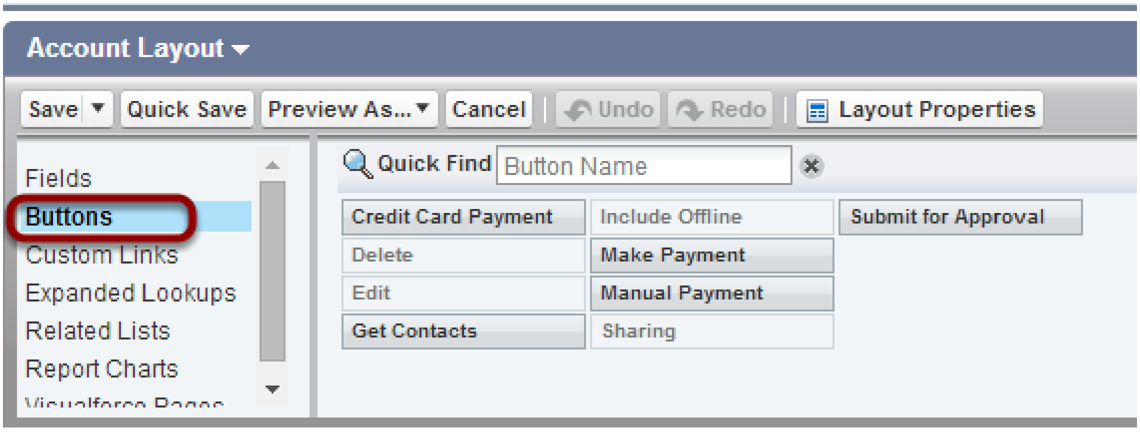
Navigate to Setup > App Setup > Customize > Contacts > Page Layouts



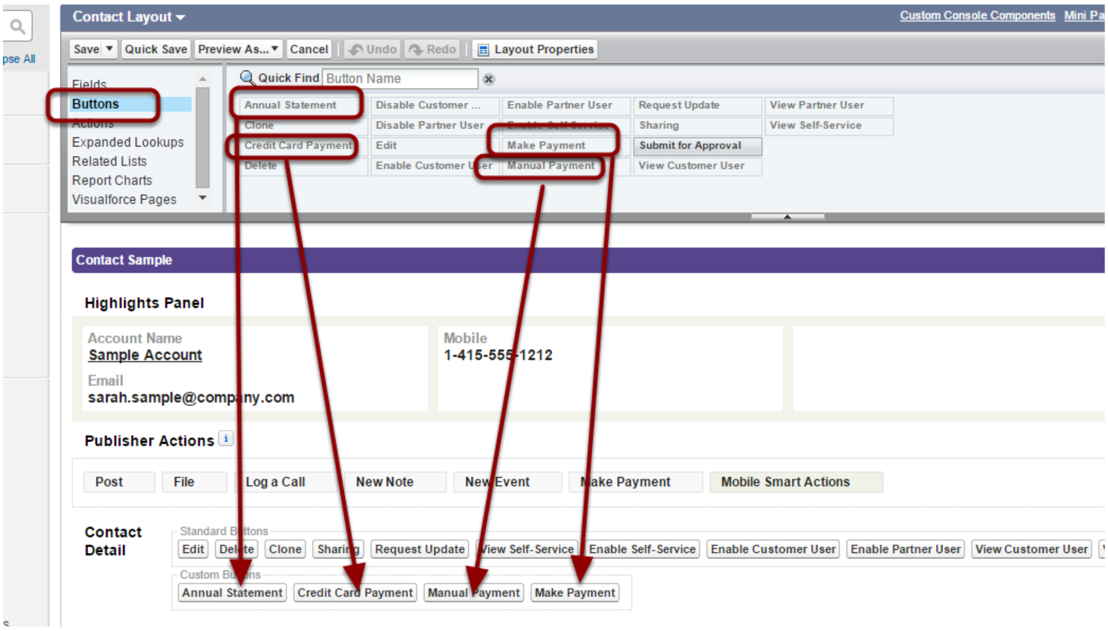
Select 'Edit' next to the page layout that you would like to add the buttons to



Select 'Buttons' from the list under 'Fields'

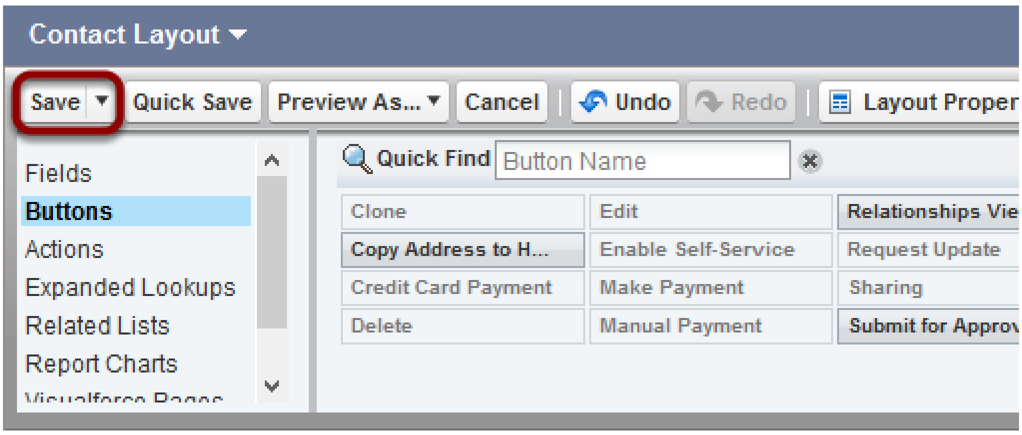


Drop & drag the 'Credit Card Payment' and 'Manual Payment' buttons onto the page layout



You can choose buttons to suit.

Save



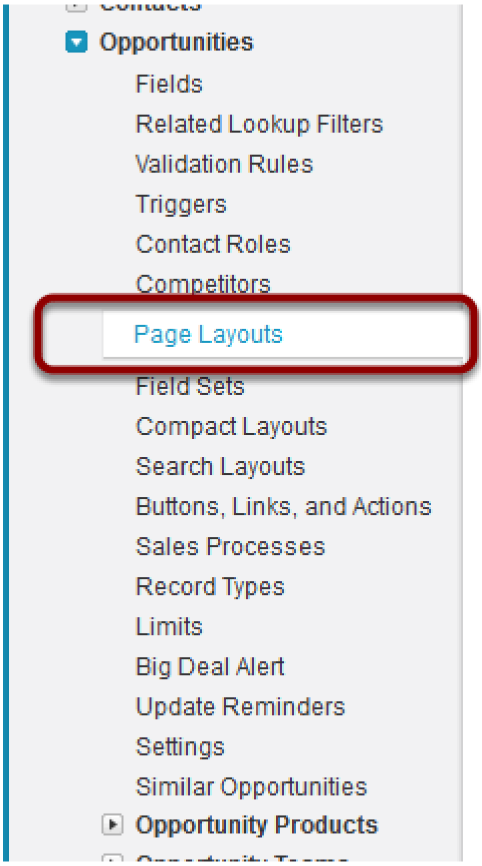
How to create a button on the Opportunity tab

Cash, Cheque, Money Orders and Credit Card payment buttons are available for Accounts, Contacts, Opportunities and Campaign Member tabs. For other objects and custom objects, custom buttons can be created by administrators. To see how to do this, please see the salesforce.com online help.

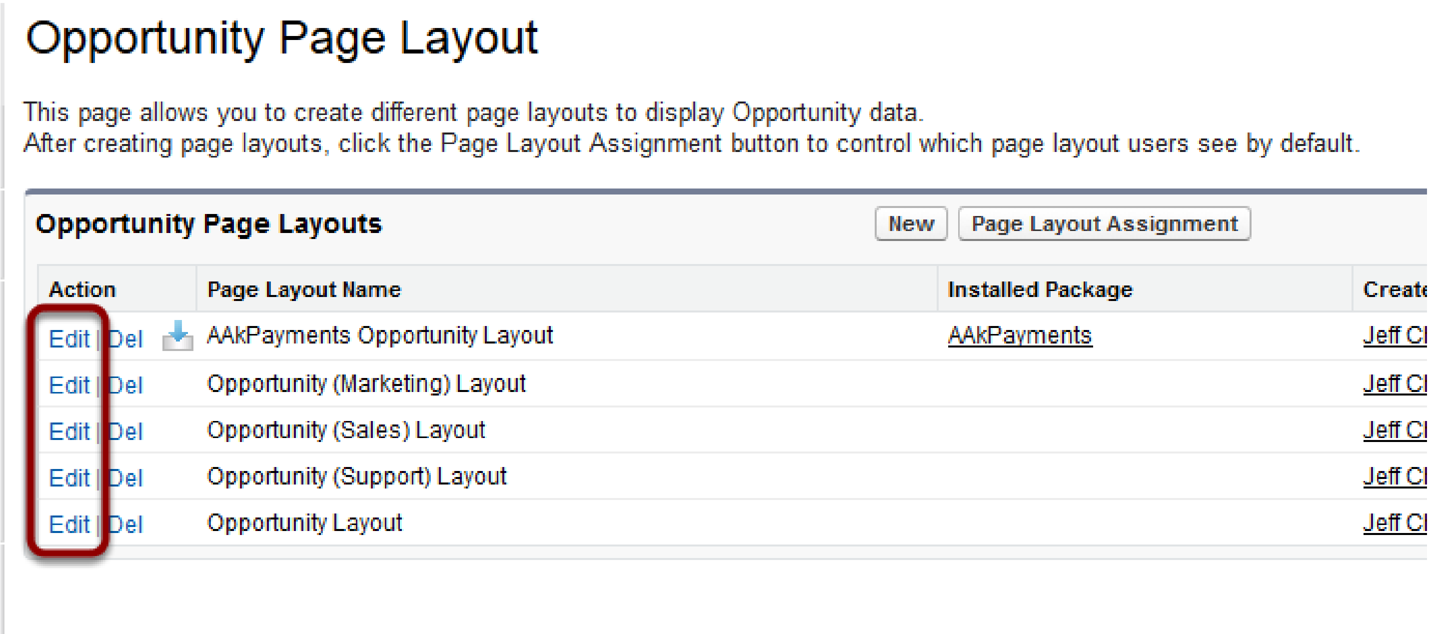
Quick Steps:

1. Edit the Opportunity Page Layout and drag/drop the following buttons onto the Page Layout
   Credit Card Payment Button - To launch the Credit Card payment/checkout form and link the transaction with the Opportunity (Optionally, you can set this to include Manual Payments as well)
   Manual Payment Button - To launch the Manual Payment form and pre-fill/link with Opportunity Details.
   Make Payment Button - Enables Credit Card Payment or Manual Payment. Also allows for selection of merchant facility and Payment Form.

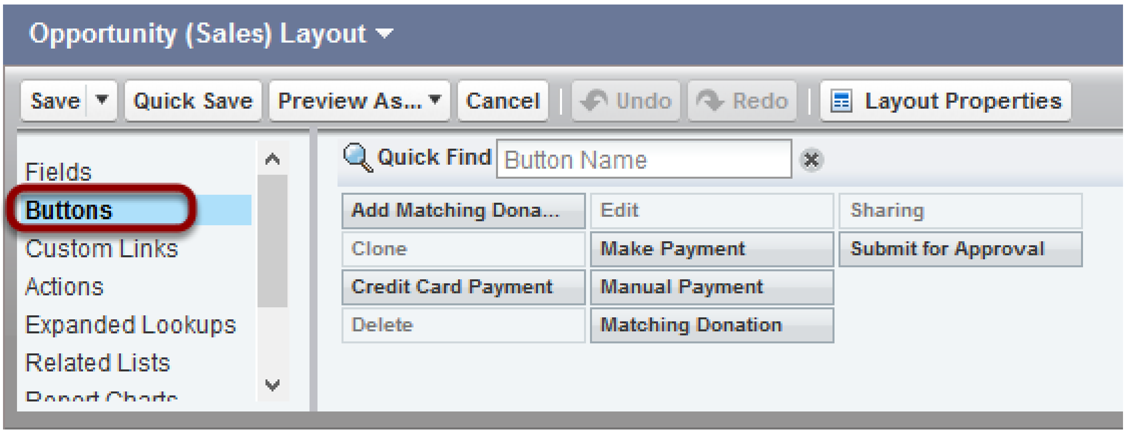
Navigate to Setup > App Setup > Customize > Opportunity > Page Layouts



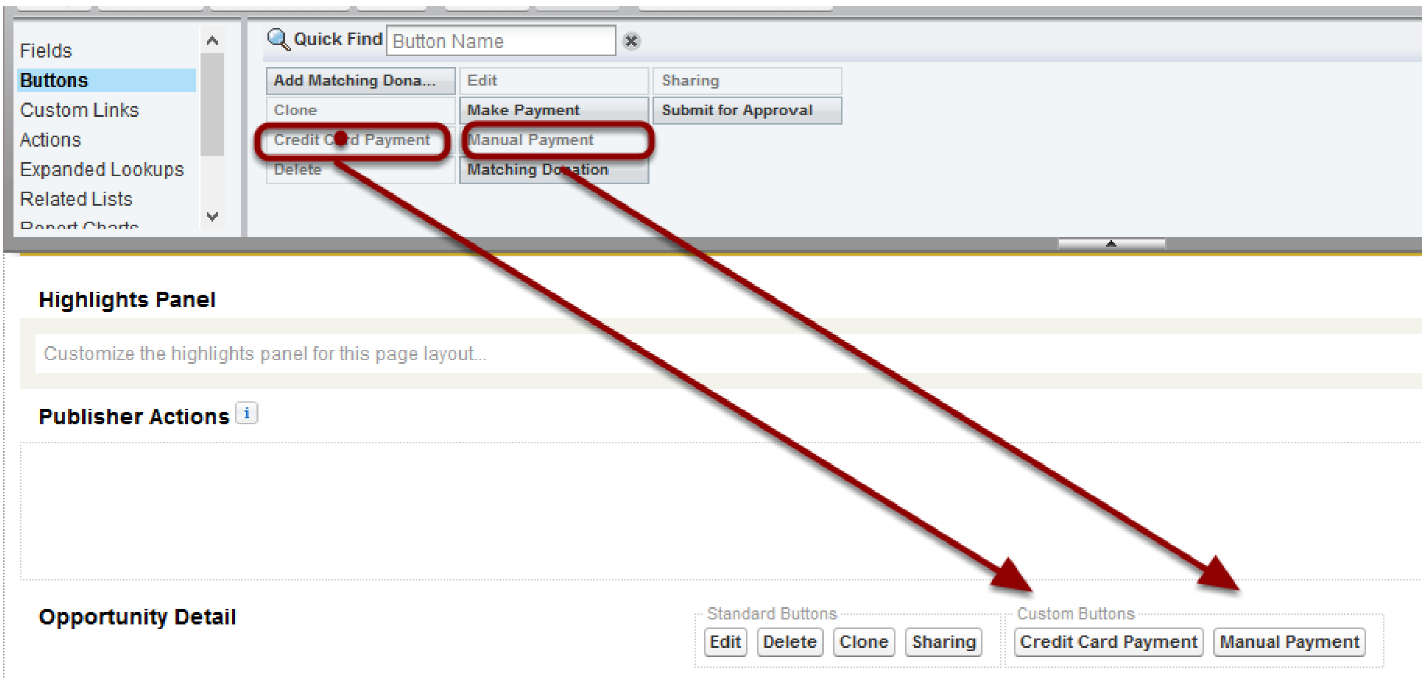
Select 'Edit' next to the page layout that you would like to add the buttons to



Select 'Buttons' from the list under 'Fields'

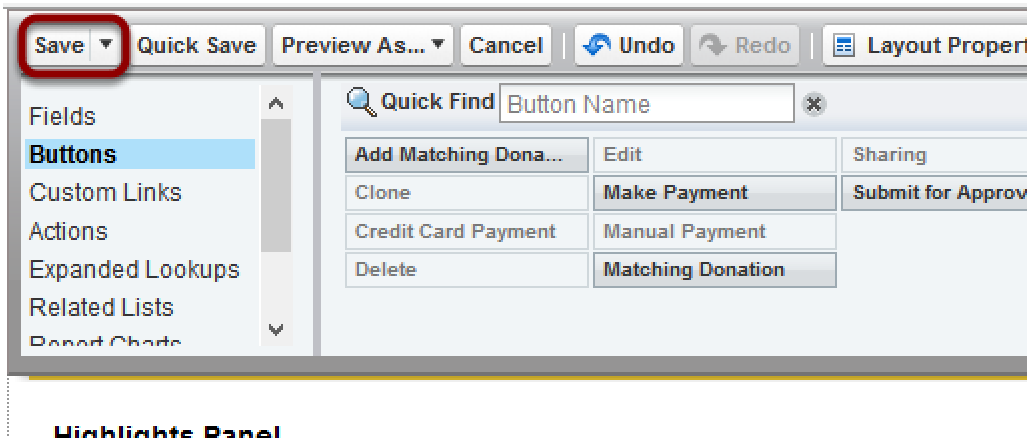


Drop & drag the 'Credit Card Payment' and 'Manual Payment' buttons onto the page layout



You can choose buttons to suit.

Save



How to create a button on the Campaign tab

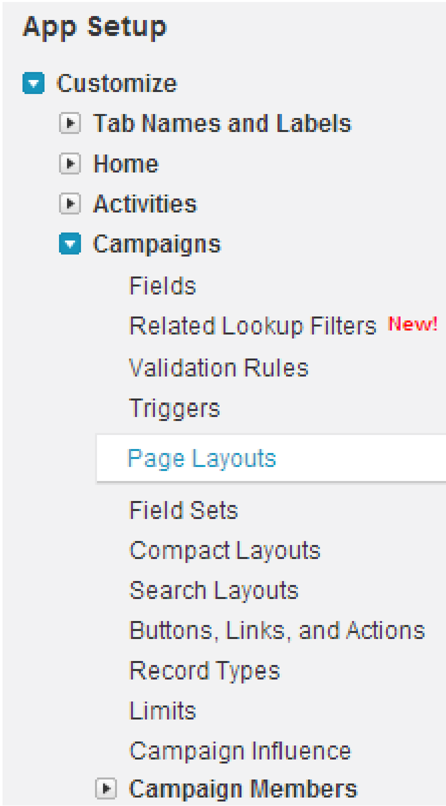
Cash, Cheque, Money Orders and Credit Card payment buttons are available for Accounts, Contacts, Opportunities and Campaign Members tabs. For other objects and custom objects, custom buttons can be created by administrators. To see how to do this, please see the salesforce.com online help.

For Campaigns, there are buttons and links to manage events registration and annual statements.

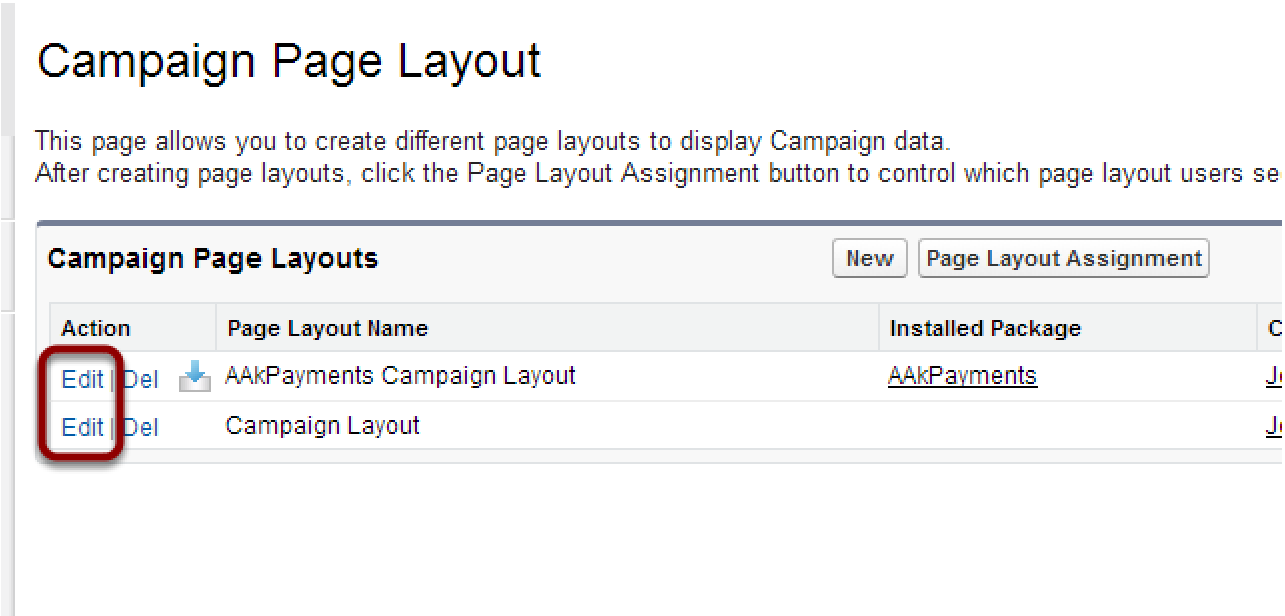
Quick Steps:

1. Edit the Campaign Page Layout and drag/drop the following buttons onto the Page Layout
   Add Event Attendee Button - Launches the Events Registration button and allows for new attendees to be added
   Statement Generation Button - Generates statements and stores annual statement PDFs against the related contacs
   Statement Send Button - Generates and sends the annual statement to the related contact.
2. Edit the Campaign Pay Layout and drag/drop the following customer links onto the Page Layout. This links show related Event Attendee reports
   Event Attendee Group List
   Event Attendee List

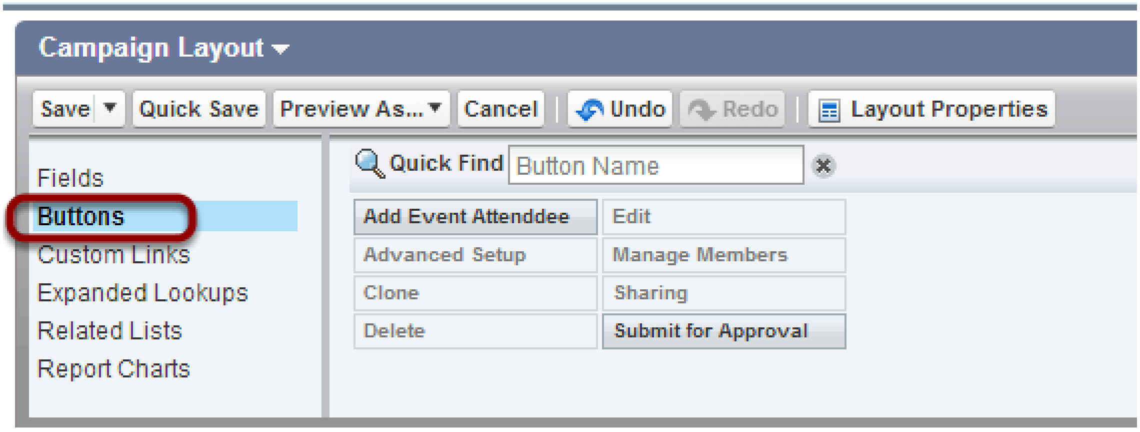
1. Navigate to Setup > App Setup > Customize > Campaigns > Page Layouts



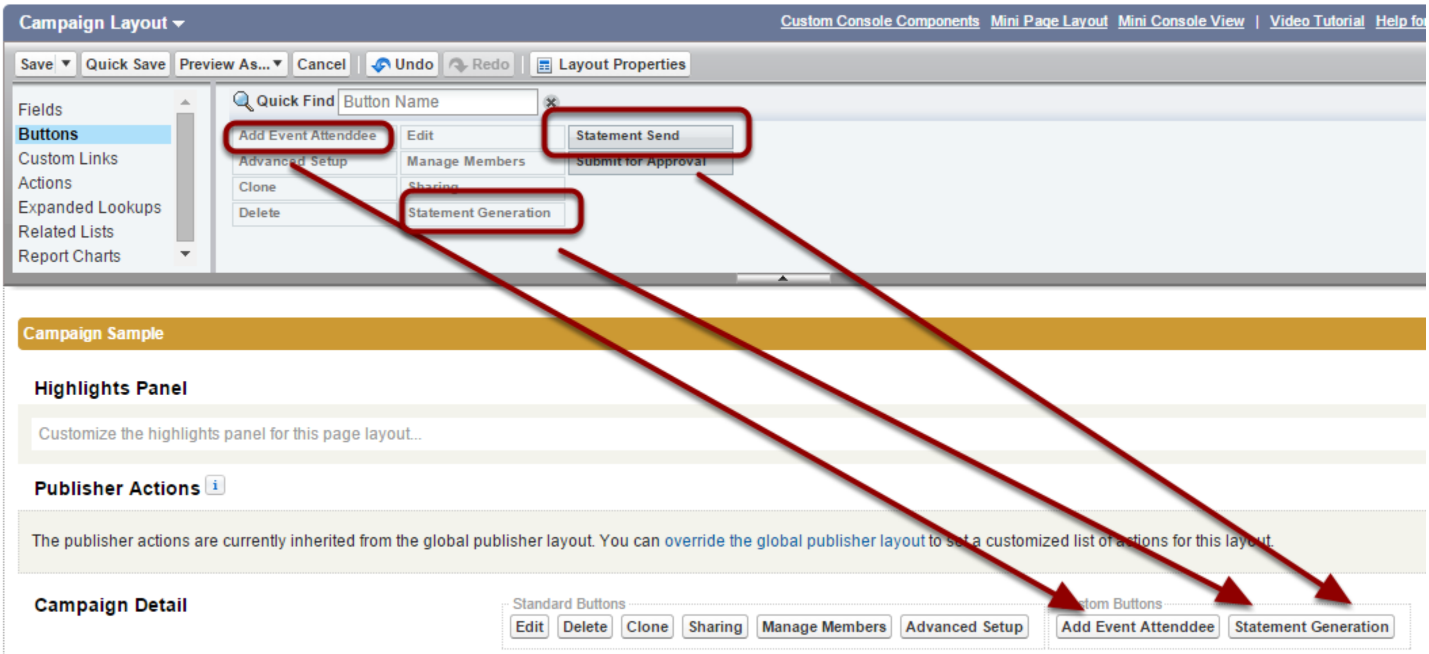
2. Select 'Edit' next to the page layout that you would like to add the buttons to



3. Select 'Buttons' from the list under 'Fields'



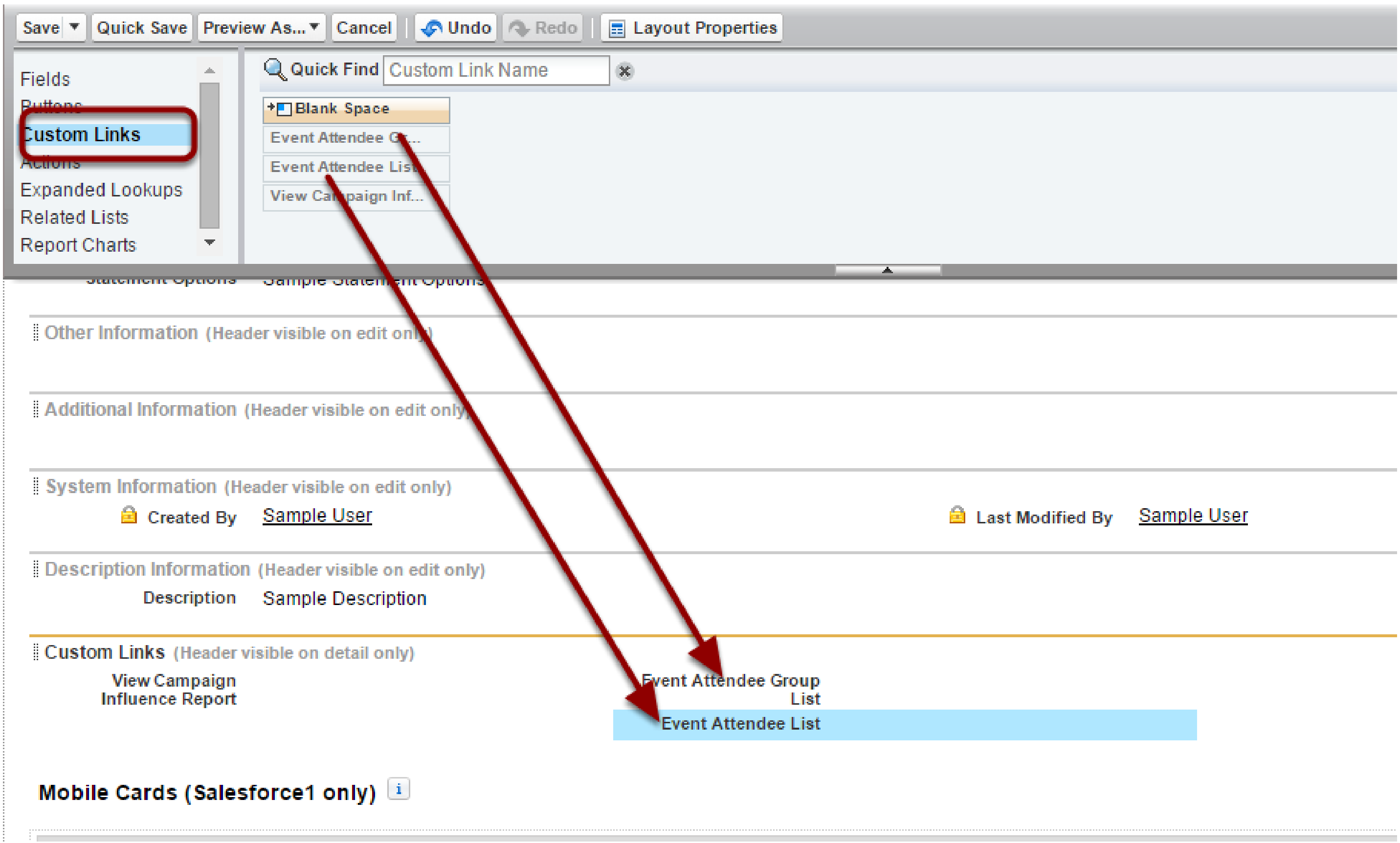
4. Drop & drag the buttons onto the page layout



Add Event Attendees provides a way of adding new attendees to an Event.

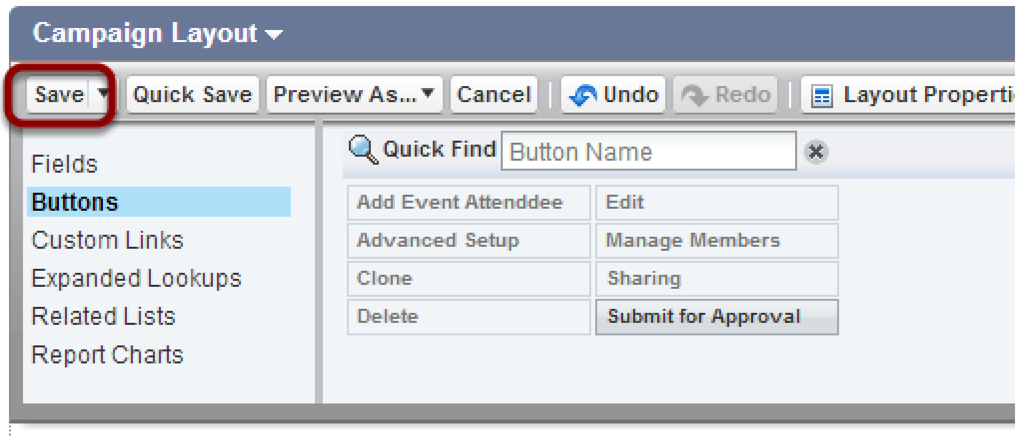
Statement Generation enables the generation of Annual Statements for all payments/donations of contacts associated with the Campaign

5. Add Custom Links



The custom links contains links to Campaign specific reports that will show lists of attendees for the Campaign

6. Save



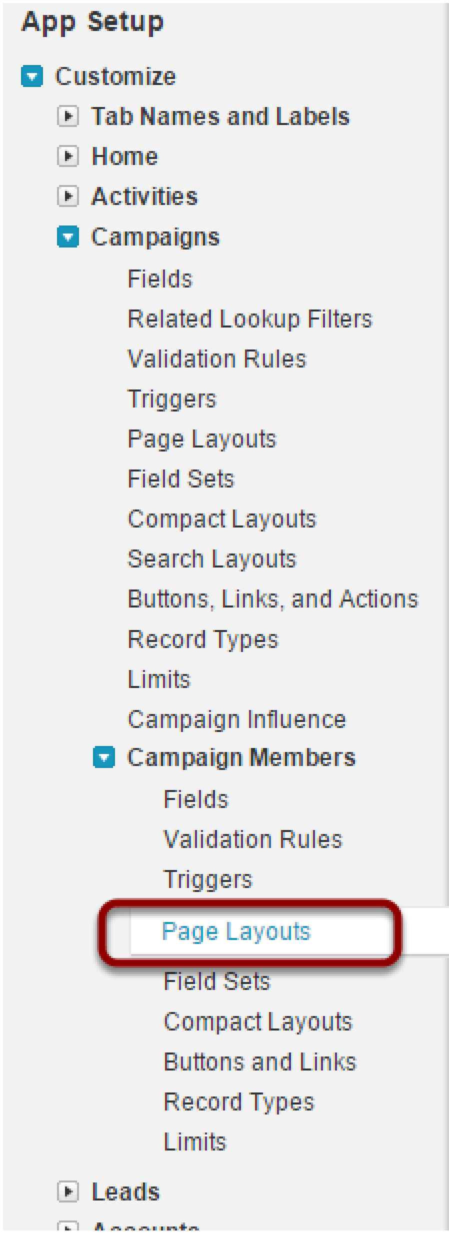
How to create a button on the Campaign Member

Cash, Cheque, Money Orders and Credit Card payment buttons are available for Accounts, Contacts, Opportunities and Campaign Members tabs. For other objects and custom objects, custom buttons can be created by administrators. To see how to do this, please see the salesforce.com online help.

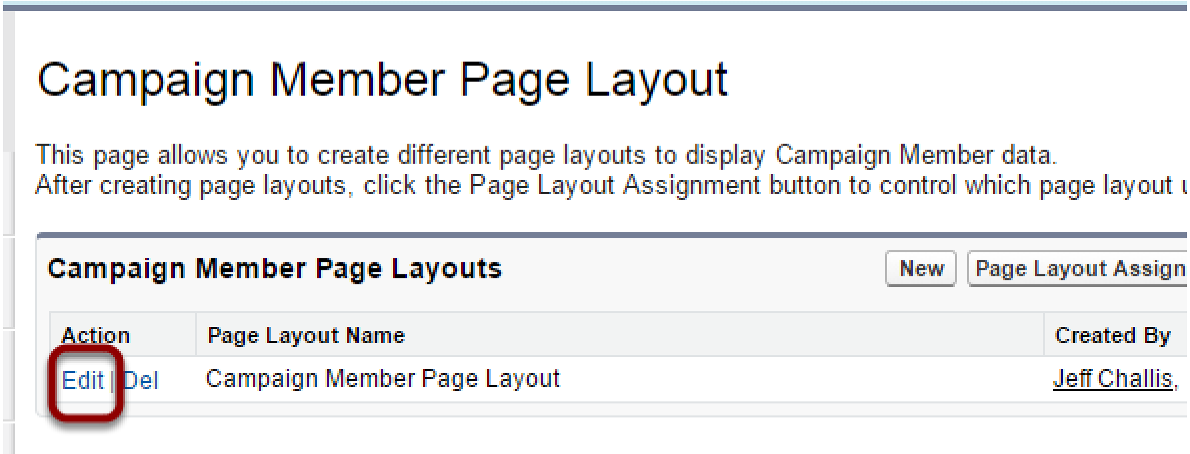
Quick Steps:

1. Edit the Campaign Member Page Layout and drag/drop the following buttons onto the Page Layout
   Credit Card Payment Button - To launch the Credit Card payment/checkout form and link the transaction with the Campaign Member - Contact (Optionally, you can set this to include Manual Payments as well)
   Manual Payment Button - To launch the Manual Payment form and pre-fill/link with Campaign Member - Contact Details.
   Annual Statement Button - Generates a statement for the related contact using the parameters last entered at the Campaign - Annual Statement Generation

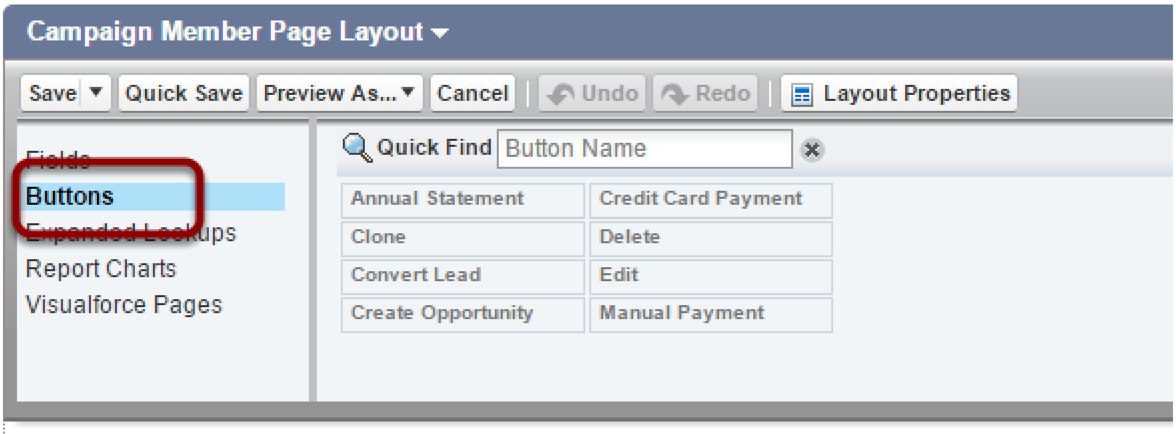
1. Navigate to Setup > App Setup > Customize > Campaigns > Campaign Members > Page Layouts



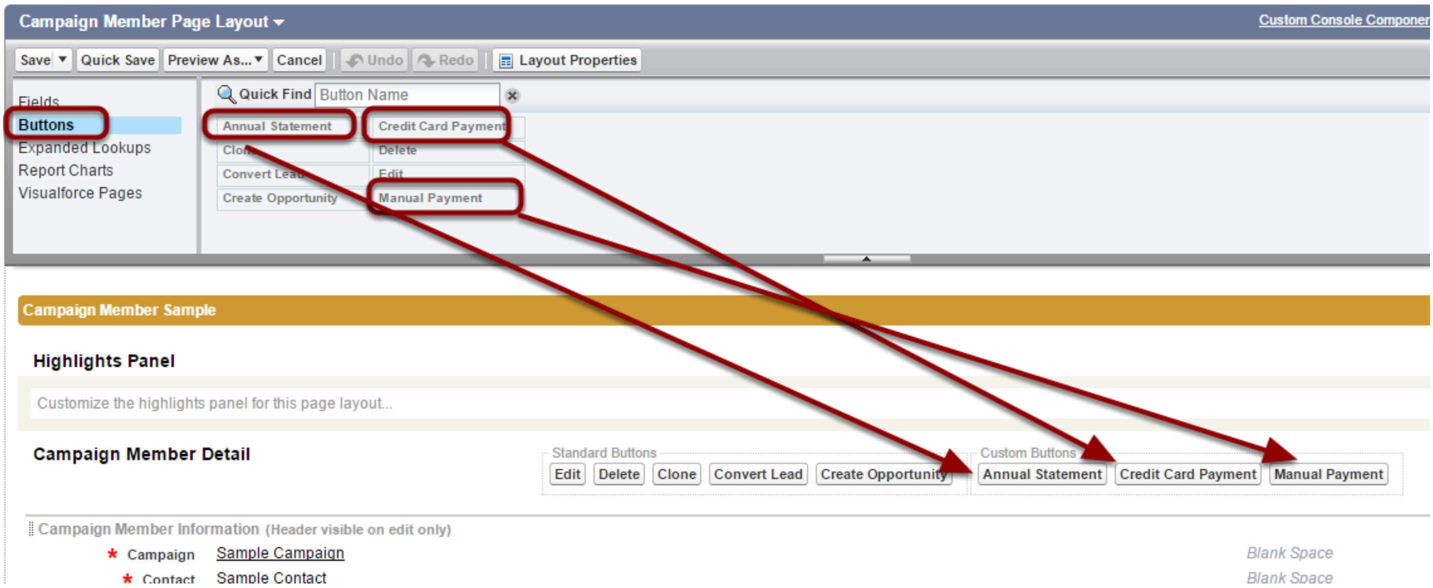
2. Select 'Edit' next to the page layout that you would like to add the buttons to



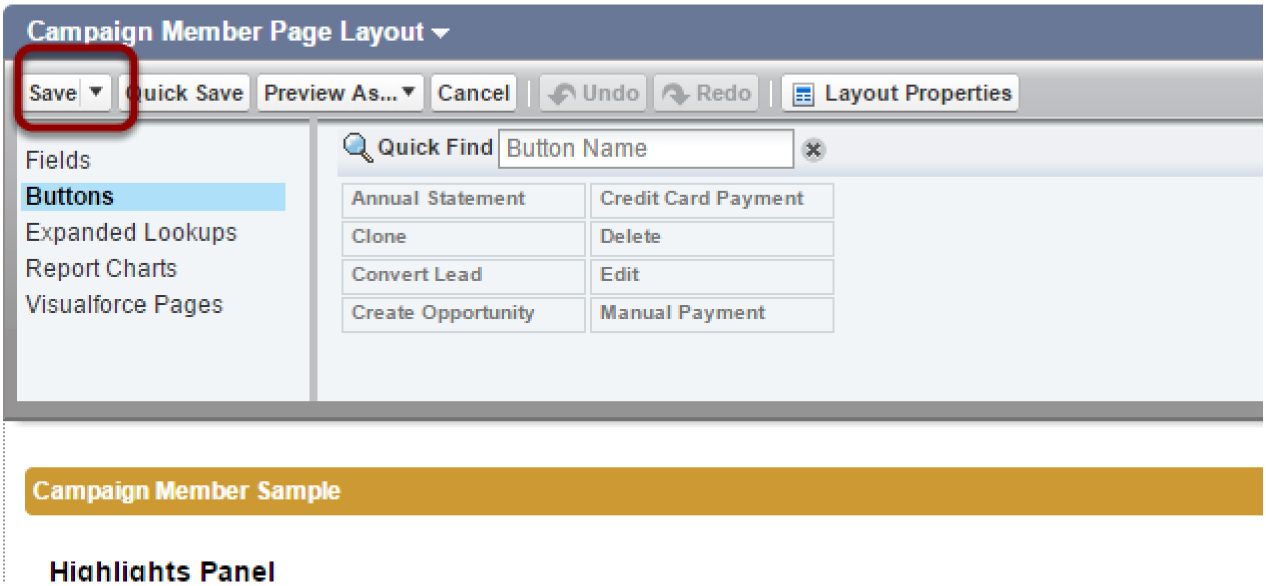
3. Select 'Buttons' from the list under 'Fields'



4. Drop & drag buttons onto the page layout



5. Save



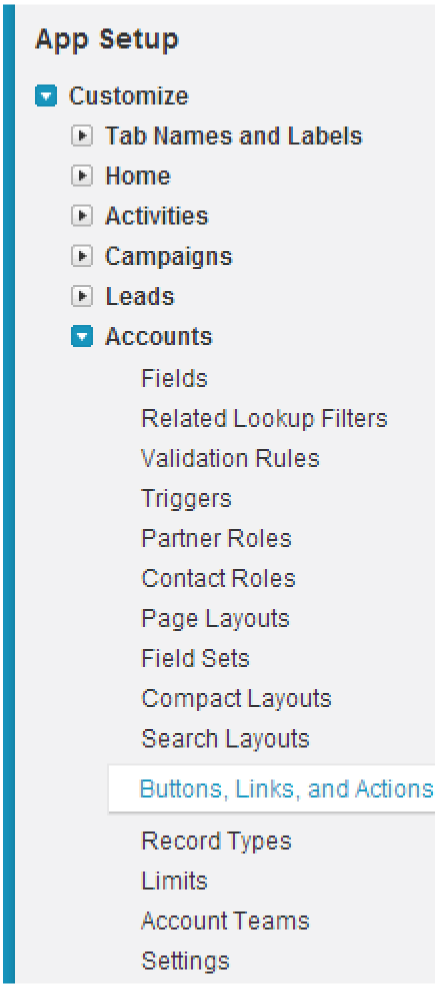
How to create a credit card button on the Persons Account tab

Salesforce.com does not currently allow for Buttons to be packaged for Person Accounts. Administrators therefore need to create their own.

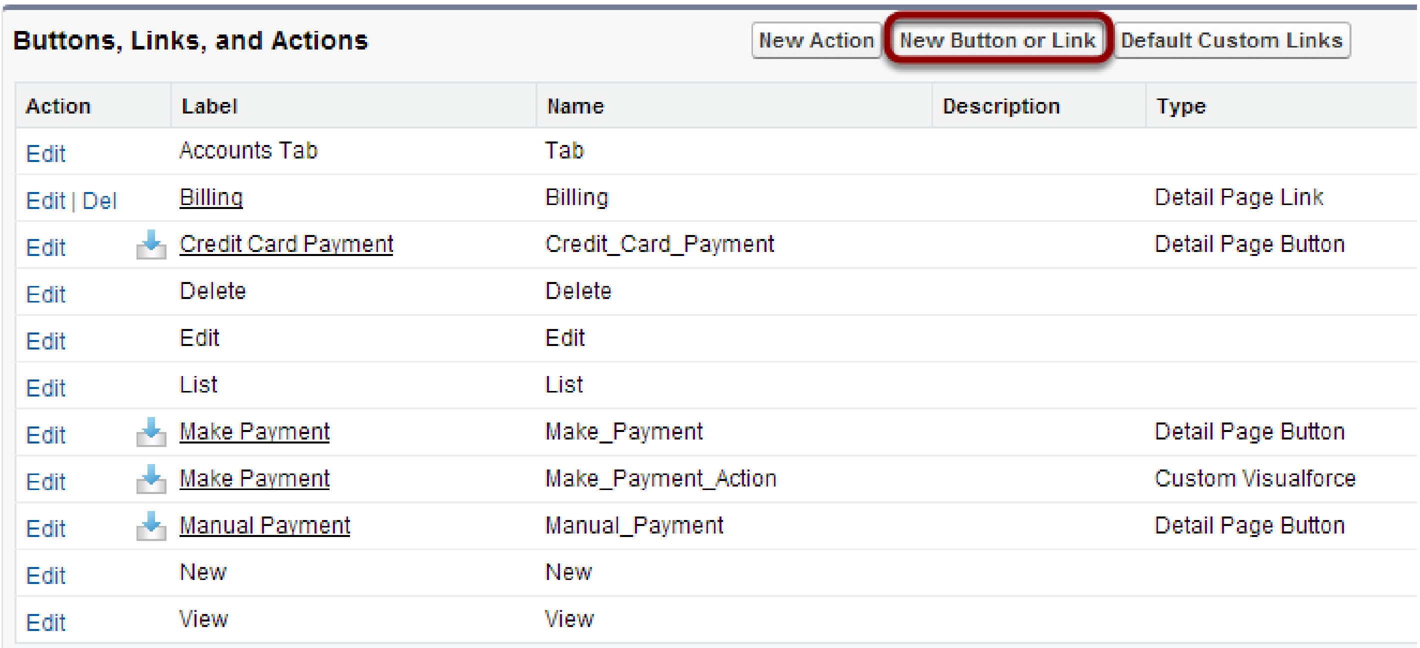
Quick steps:

1. Add a new button called "Credit Card Payment" to the Account buttons and links. Use the URL value of /apex/AAkPay__mcheckout?aId={!Account.Id}&MailingStreet={!Account.PersonMailingStreet}&MailingSta
2. Add new button to the Person Account Page Layout

Navigate to Setup > App Setup > Customize > Accounts > Button, Links and Actions



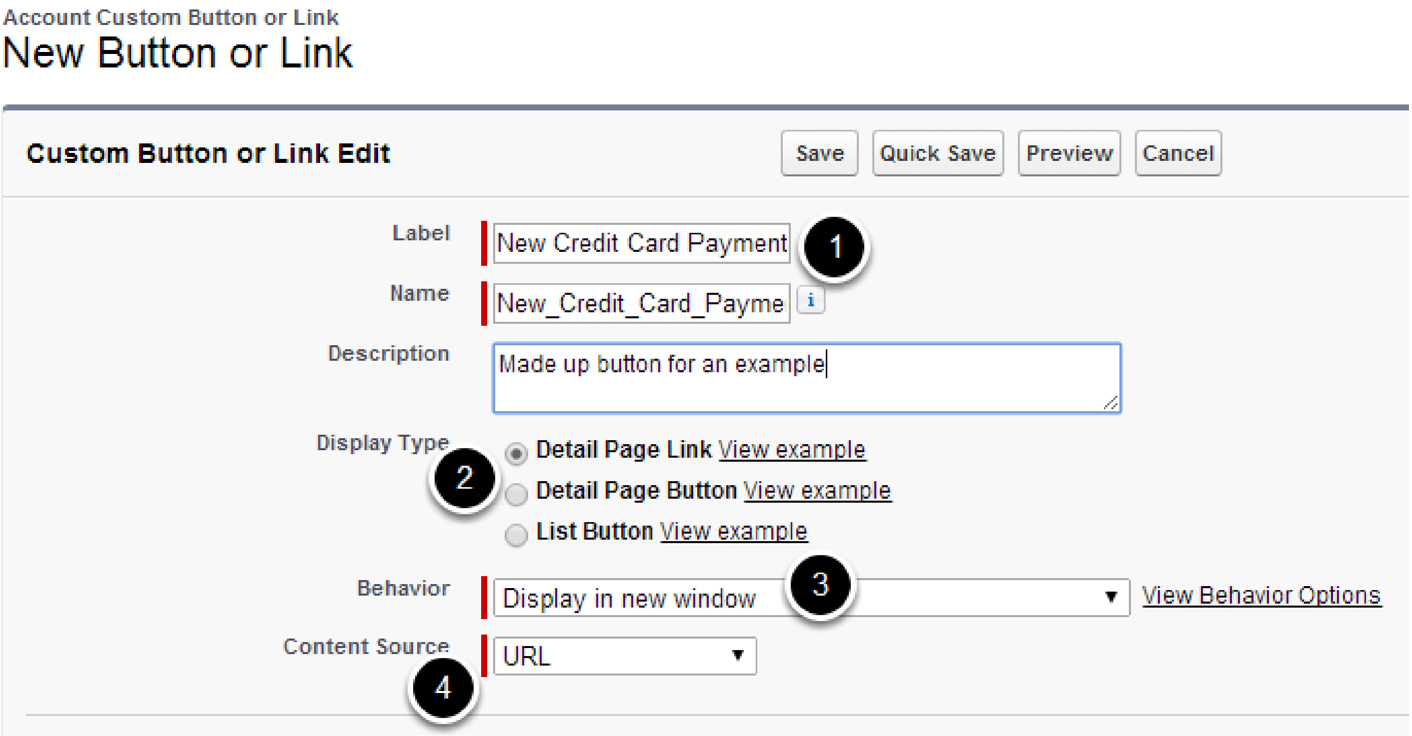
Select 'New Button or Link'



Buttons, Links, and Actions — New Action | New Button or Link | Default Custom Links

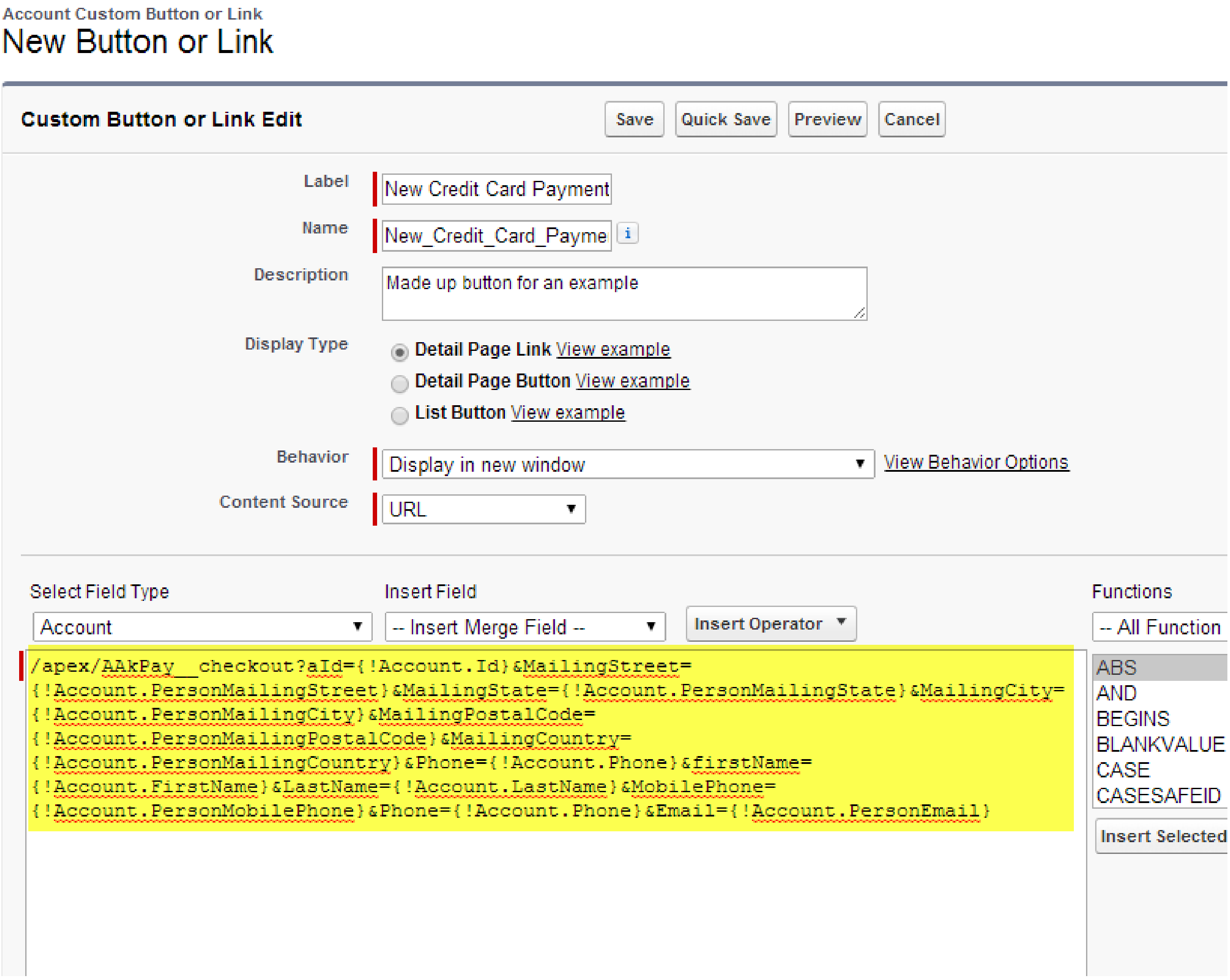
Action	Label	Name	Description	Type
Edit	Accounts Tab	Tab		
Edit | Del	Billing	Billing		Detail Page Link
Edit	Credit Card Payment	Credit_Card_Payment		Detail Page Button
Edit	Delete	Delete		
Edit	Edit	Edit		
Edit	List	List		
Edit	Make Payment	Make_Payment		Detail Page Button
Edit	Make Payment	Make_Payment_Action		Custom Visualforce
Edit	Manual Payment	Manual_Payment		Detail Page Button
Edit	New	New		
Edit	View	View		

Fill in the details for the new button



1. Create a Label for your new button. This will automatically be the Name
2. Select 'Detail Page Link' for Display Type
3. Select 'Display in new window' for Behavior
4. Select 'URL' for the Content Source

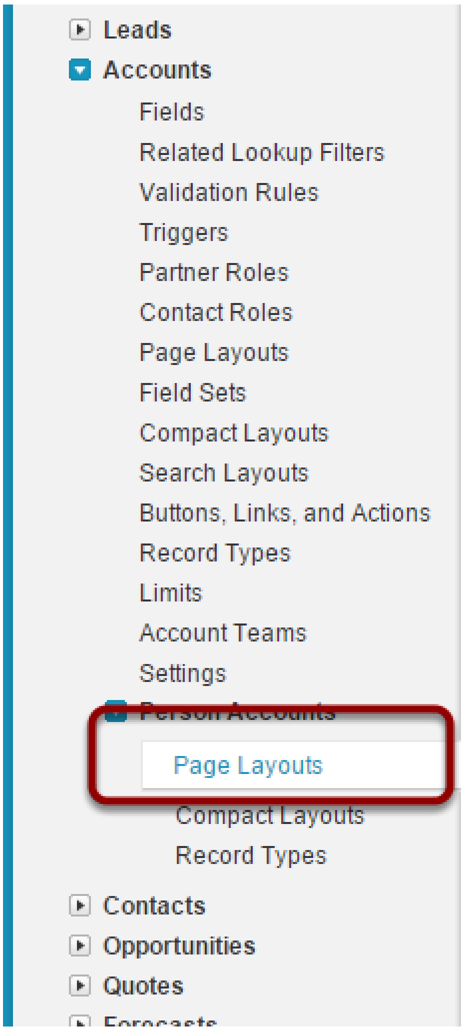
Cut and paste the following code into the text field



/apex/
AAkPay__checkout?aId={!Account.Id}&MailingStreet={!Account.PersonMailingStreet}&MailingState={!Acco

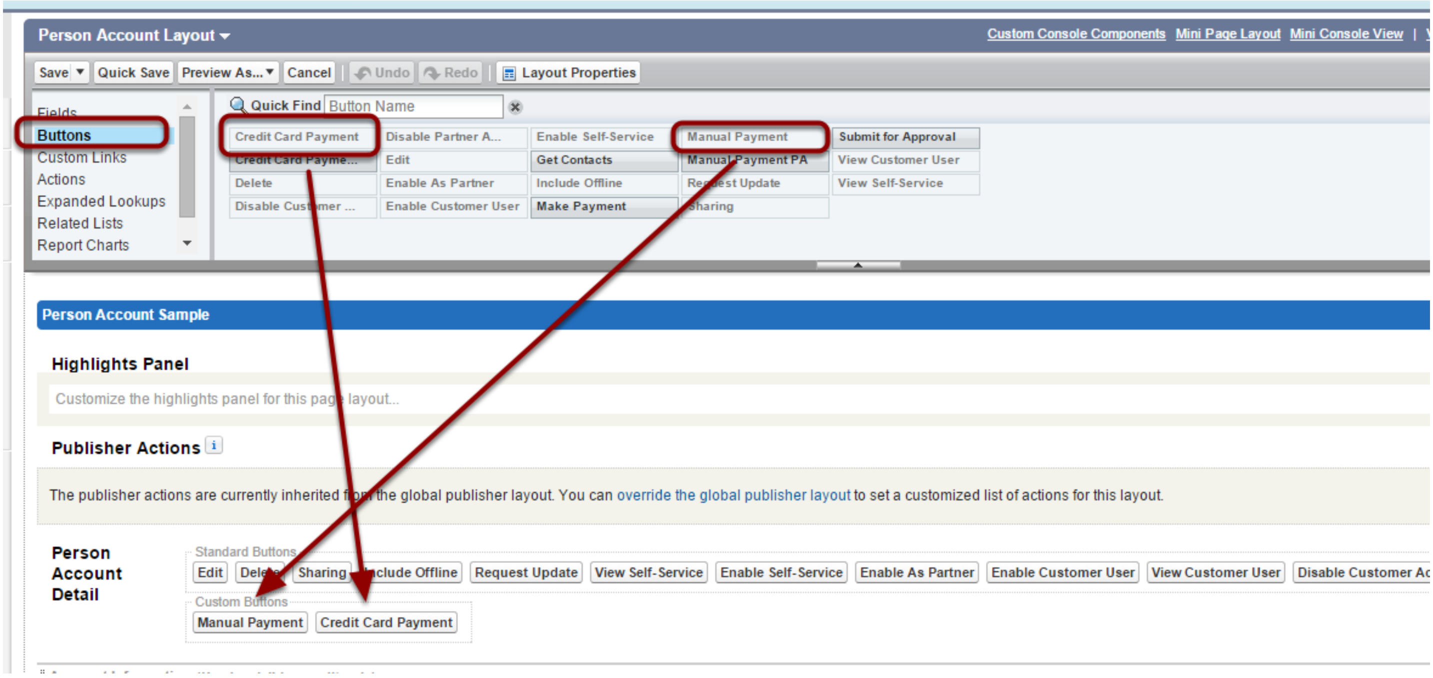
Add the new button to your page layout

Navigate to Setup > App Setup > Customize > Accounts > Person Accounts > Page Layouts



Select 'Edit'

Drop and drag the buttons into the page layout



Save

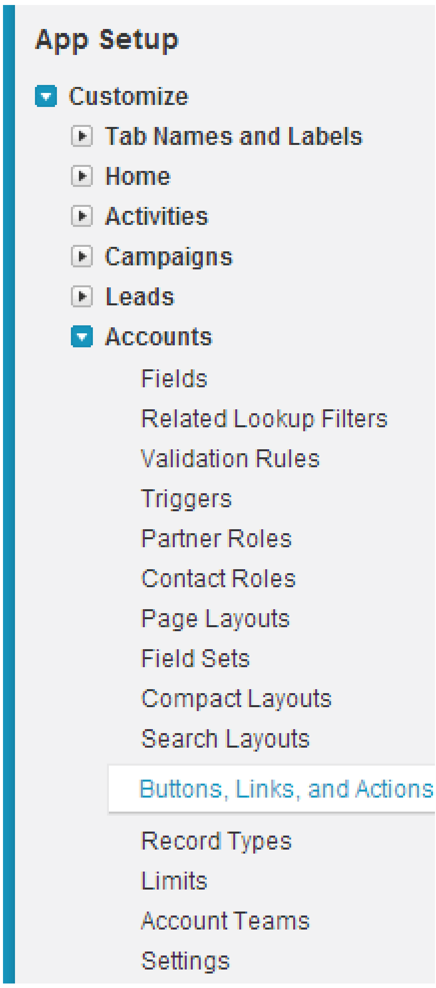
How to create a manual payment button on the Persons Account tab

Salesforce.com does not currently allow for Buttons to be packaged for Person Accounts. Administrators therefore need to create their own.

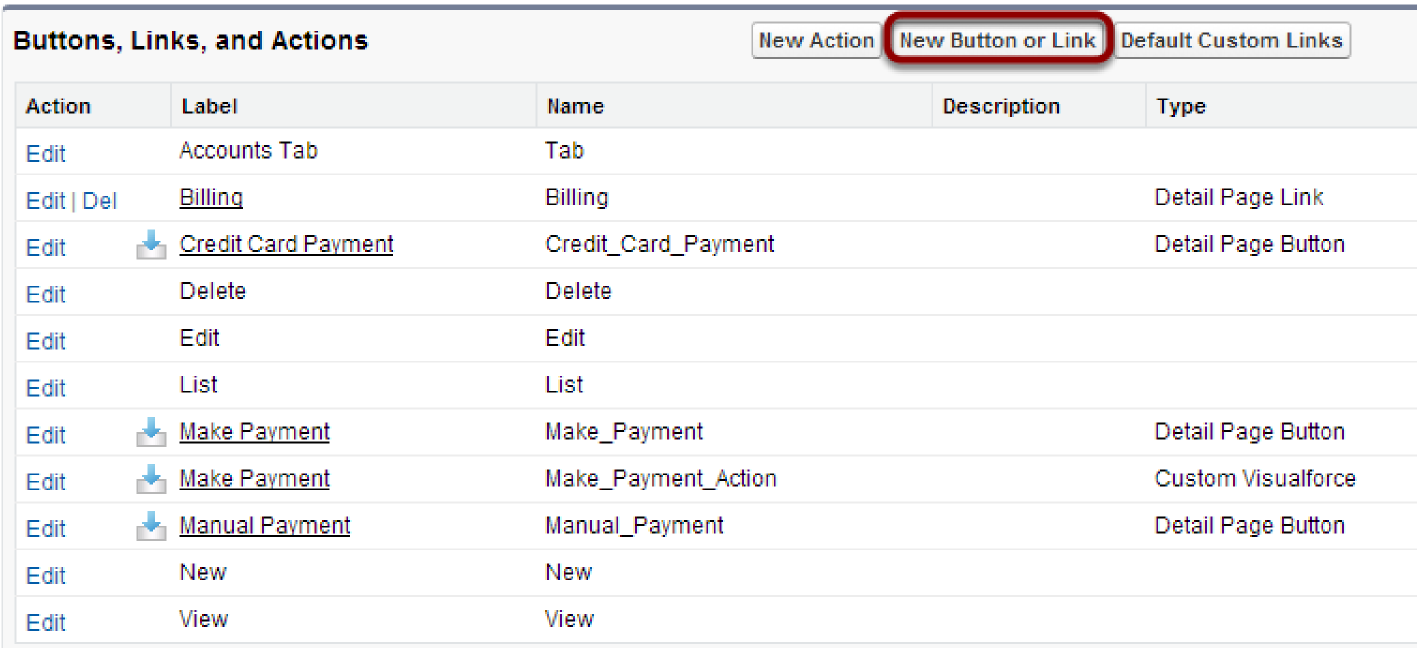
Quick steps:

1. Add a new button called "Manual Payments" to the Account buttons and links. Use the URL value of /apex/ AAkPay__manualPayment?aId={!Account.Id}&MailingStreet={!Account.PersonMailingStreet}&Maili
2. Add new button to the Person Account Page Layout

1. Navigate to Setup > App Setup > Customize > Accounts > Button, Links and Actions



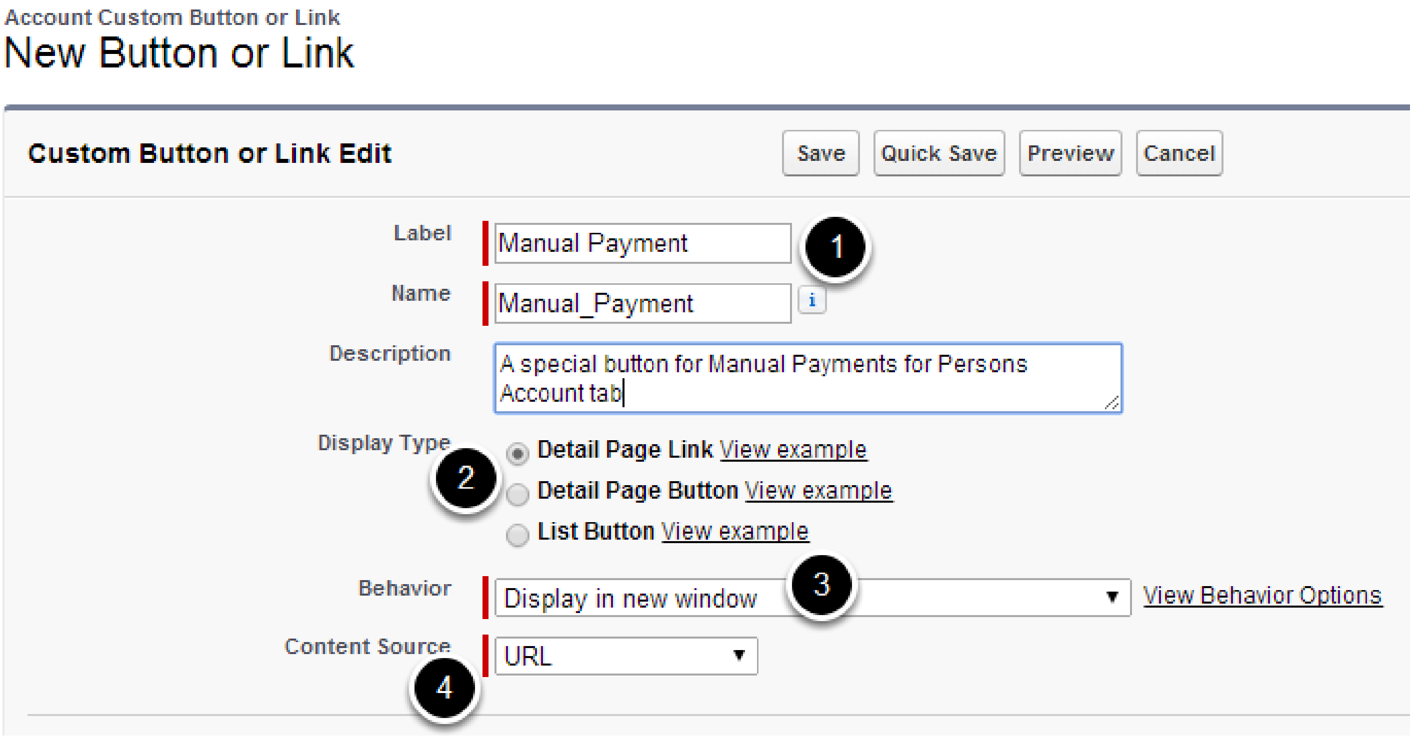
2. Select 'New Button or Link'



Buttons, Links, and Actions — New Action | New Button or Link | Default Custom Links

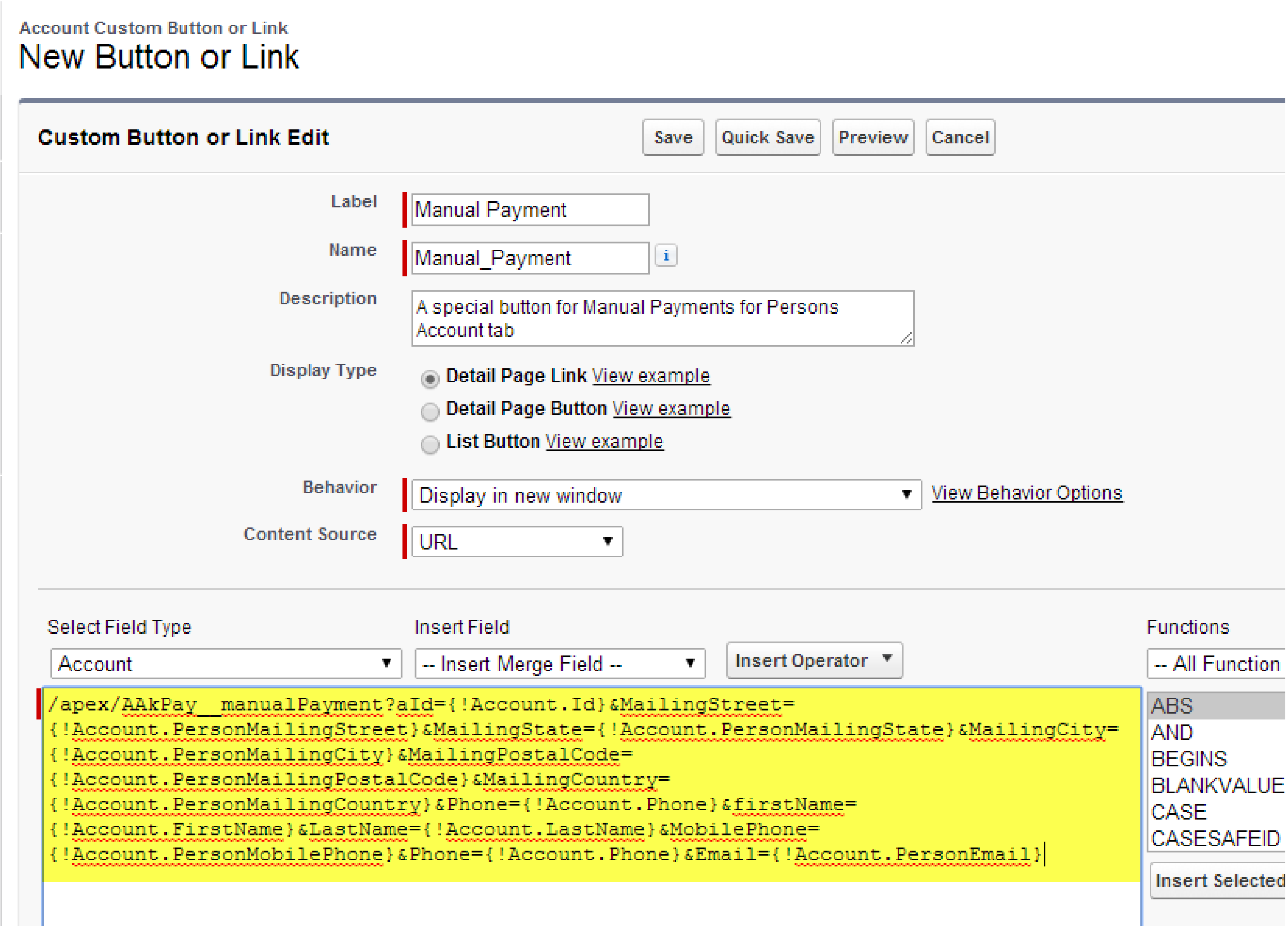
Action	Label	Name	Description	Type
Edit	Accounts Tab	Tab		
Edit | Del	Billing	Billing		Detail Page Link
Edit	Credit Card Payment	Credit_Card_Payment		Detail Page Button
Edit	Delete	Delete		
Edit	Edit	Edit		
Edit	List	List		
Edit	Make Payment	Make_Payment		Detail Page Button
Edit	Make Payment	Make_Payment_Action		Custom Visualforce
Edit	Manual Payment	Manual_Payment		Detail Page Button
Edit	New	New		
Edit	View	View		

3. Fill in the details for the new button



1. Create a Label for your new button. This will automatically be the Name
2. Select 'Detail Page Link' for Display Type
3. Select 'Display in new window' for Behavior
4. Select 'URL' for the Content Source

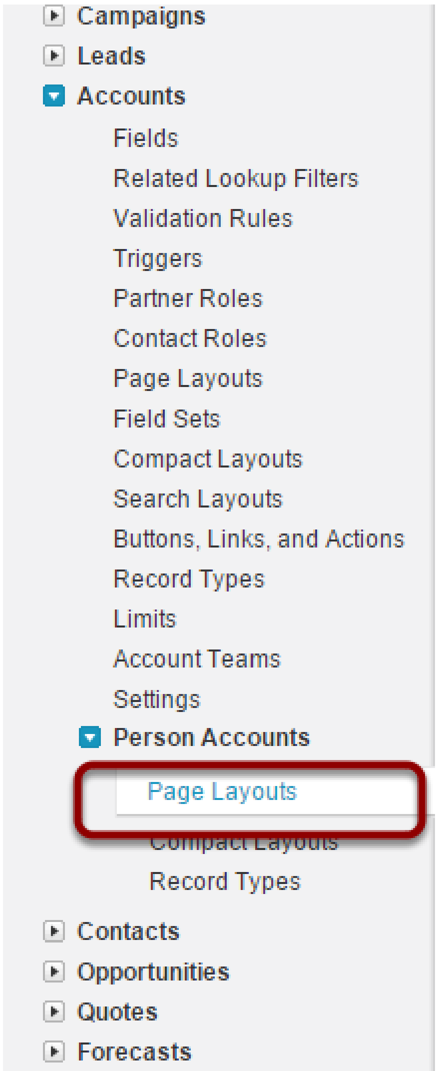
4. Cut and paste the following code into the text field



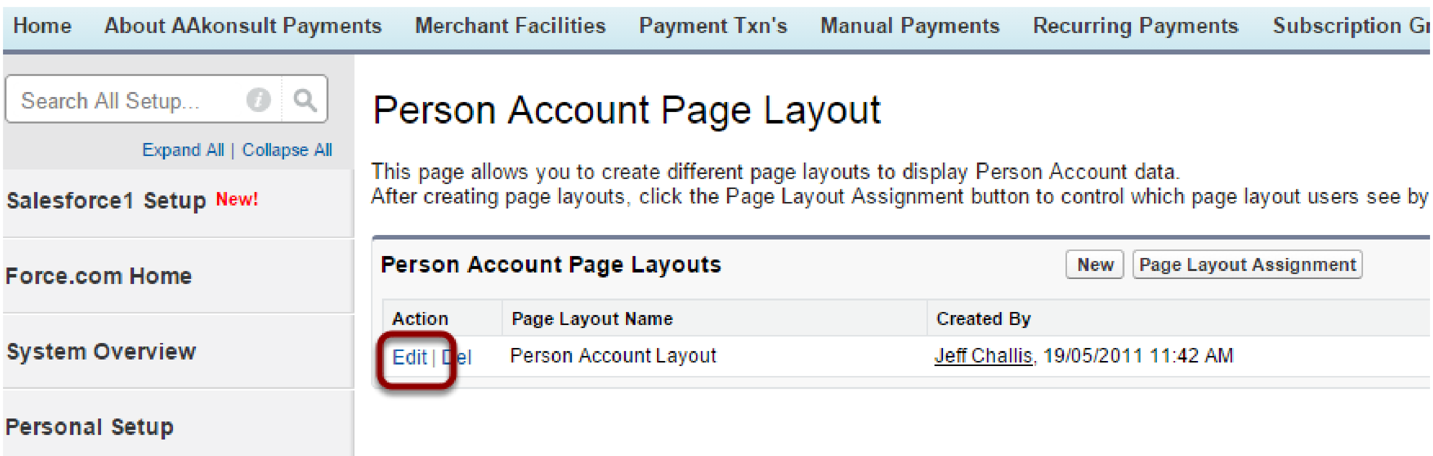
/apex/
AAkPay__manualPayment?aId={!Account.Id}&MailingStreet={!Account.PersonMailingStreet}&MailingState

5. Add the new button to your page layout

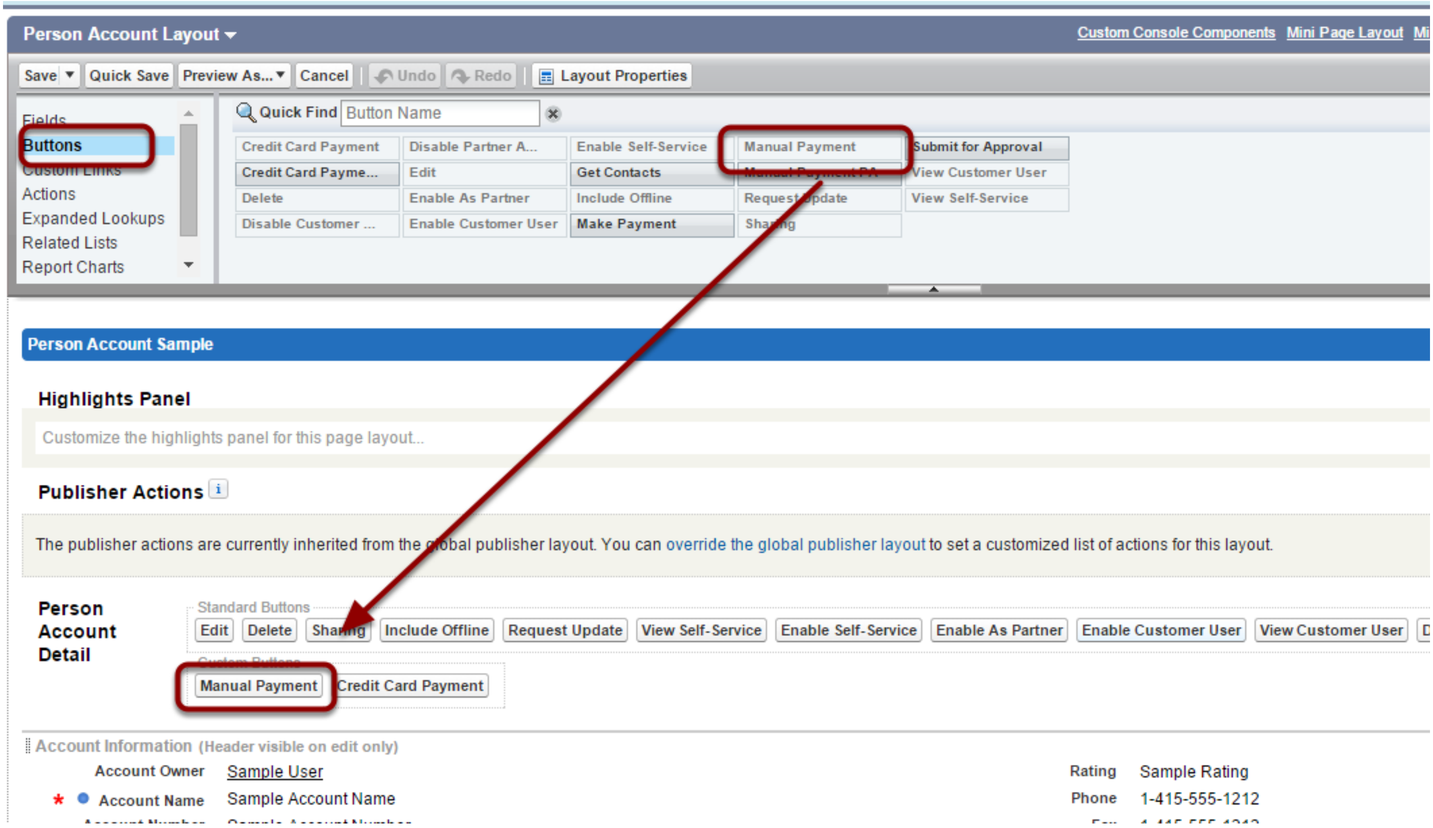
5.1 Navigate to Setup > App Setup > Customize > Accounts > Person Accounts > Page Layouts



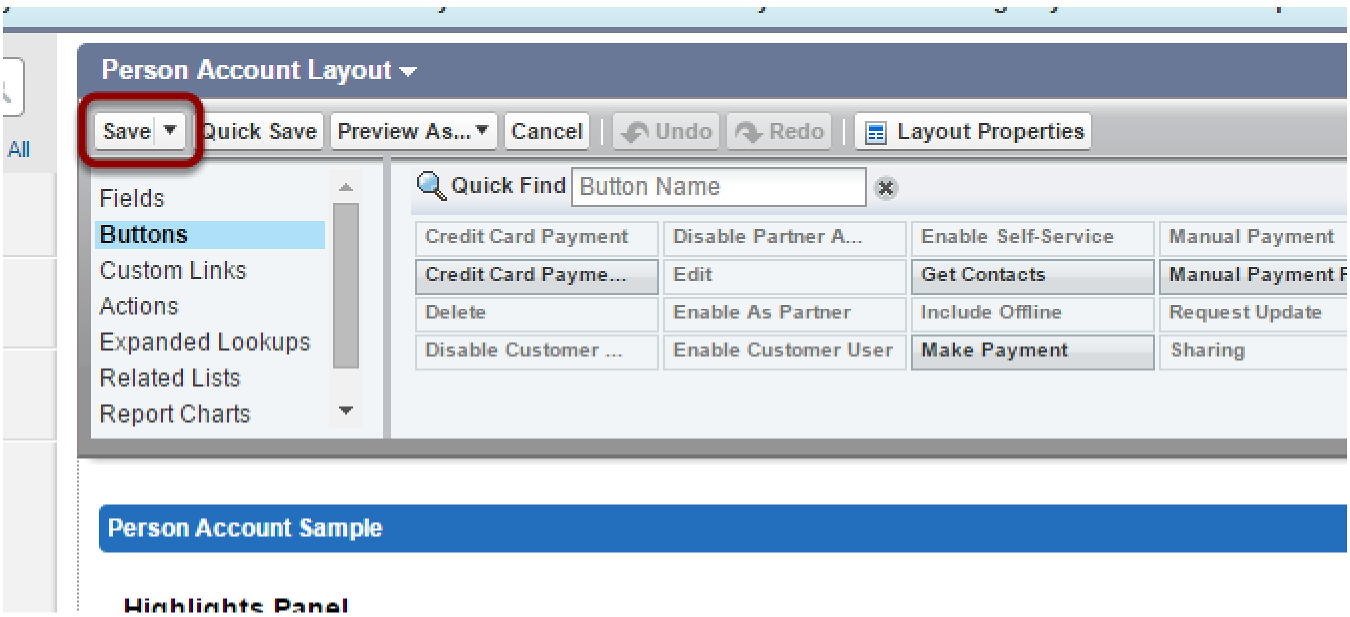
5.2 Select 'Edit'



5.3 Drop and drag the buttons into the page layout



5.4 Save



How to create a button on any object

You may link AAkonsult to almost any object in salesforce.com, including Custom Objects.

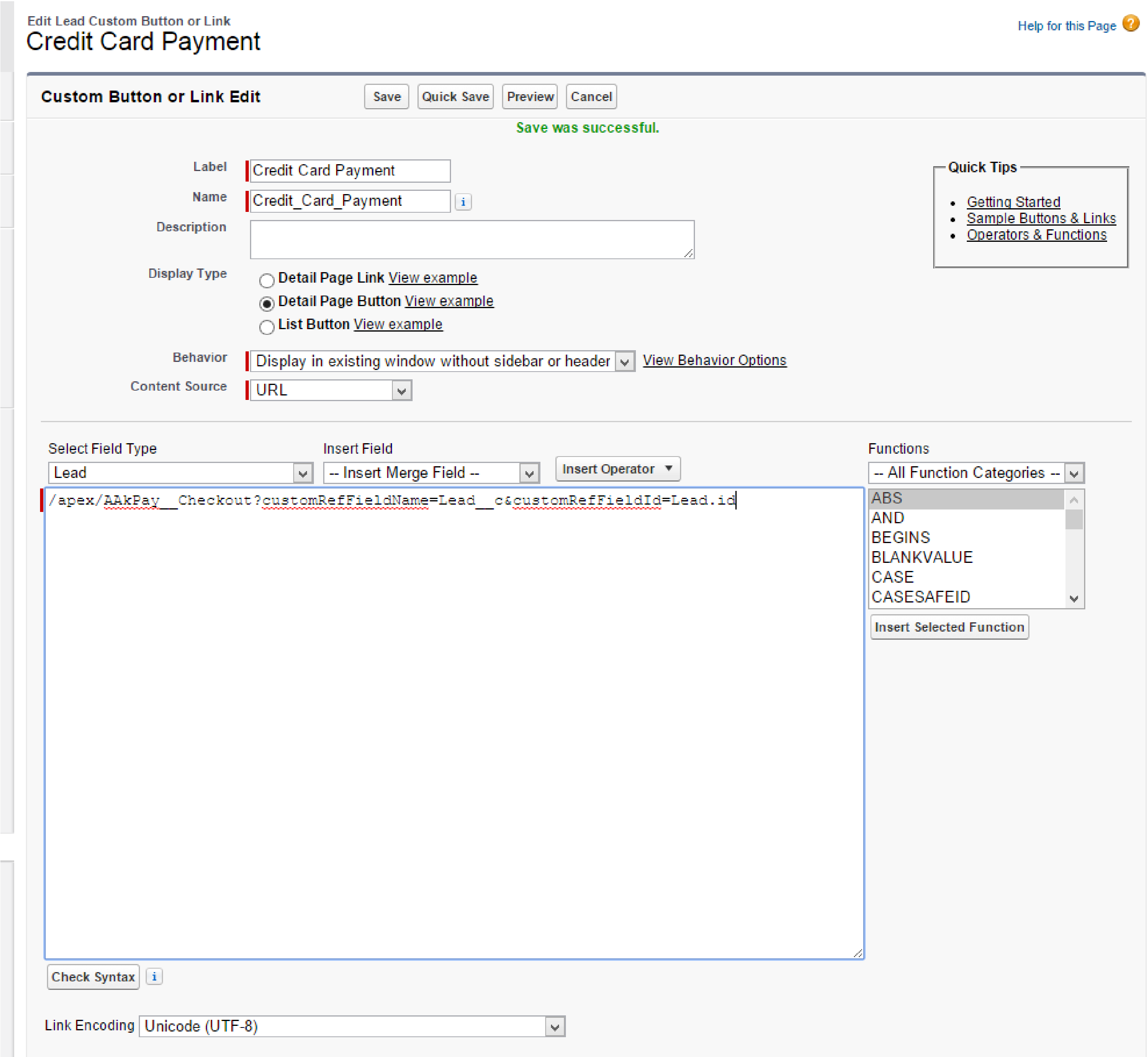
a) Create a lookup from Payment Txn’s Object to your destination Object.

b) Create a Custom Button(s)

c) Add these to the page layout.

Note: For an example, if you wanted to allow for payments with leads, then a new field of type lookup, would be added to the Payment Txn’s (AAkPay__Payment_Txn__c) Object.

How to create custom buttons



The button must be created on the destination object. In the above example, the button would be created on the leads Object.

Use the following URL's

- **For Credit Card Payments,** “/apex/AAkPay__Checkout?customRefFieldName={xxxxx}&customRefFieldId ={yyyyy}"
- **For Manual Payments** “/apex/AAkPay__manualPayment?customRefFieldName={xxxxx}&customRefFieldId ={yyyyy}"

Where {xxxxx} is the internal fieldname that was created on Payment_Txn__c object, for example lead__c

Where {yyyyy} is a record id of the object that is being linked to. In the lead example, this would be the button merge field of {!Lead.Id}

How to add Make Payment button

The Make Payment Button is a button the can be added to Accounts, Contacts, Opportunities.

It is designed to work in conjunction with Publisher Actions making it suitable for Salesforce1 Mobile (non native mode)

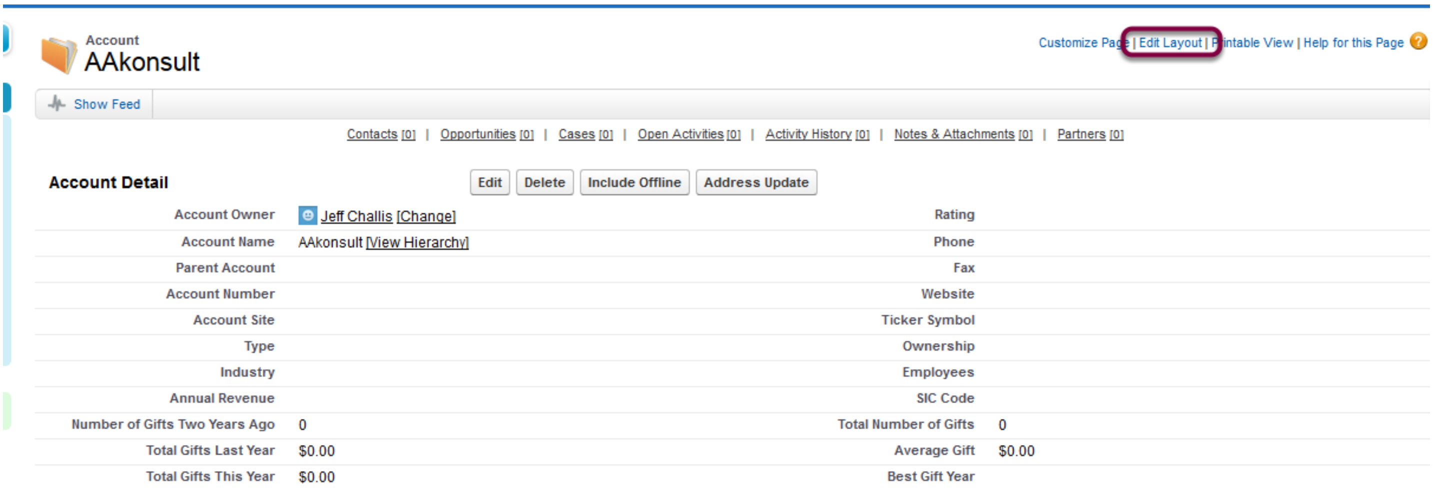
Make Payment Button provides a launch pad for four existing functions. These are:

1. Credit Card/Checkout Form
2. Manual Payment Form
3. Token Charge Form
4. Membership/Subscription Renewal

Only the available options will be shown. If for example, there is no related Recurring Payment, then Token Charge will not be available.

Make Payment includes a number of URL parameter options to allow for some fine tuning. Please see the Make Payment URL Options for more info.

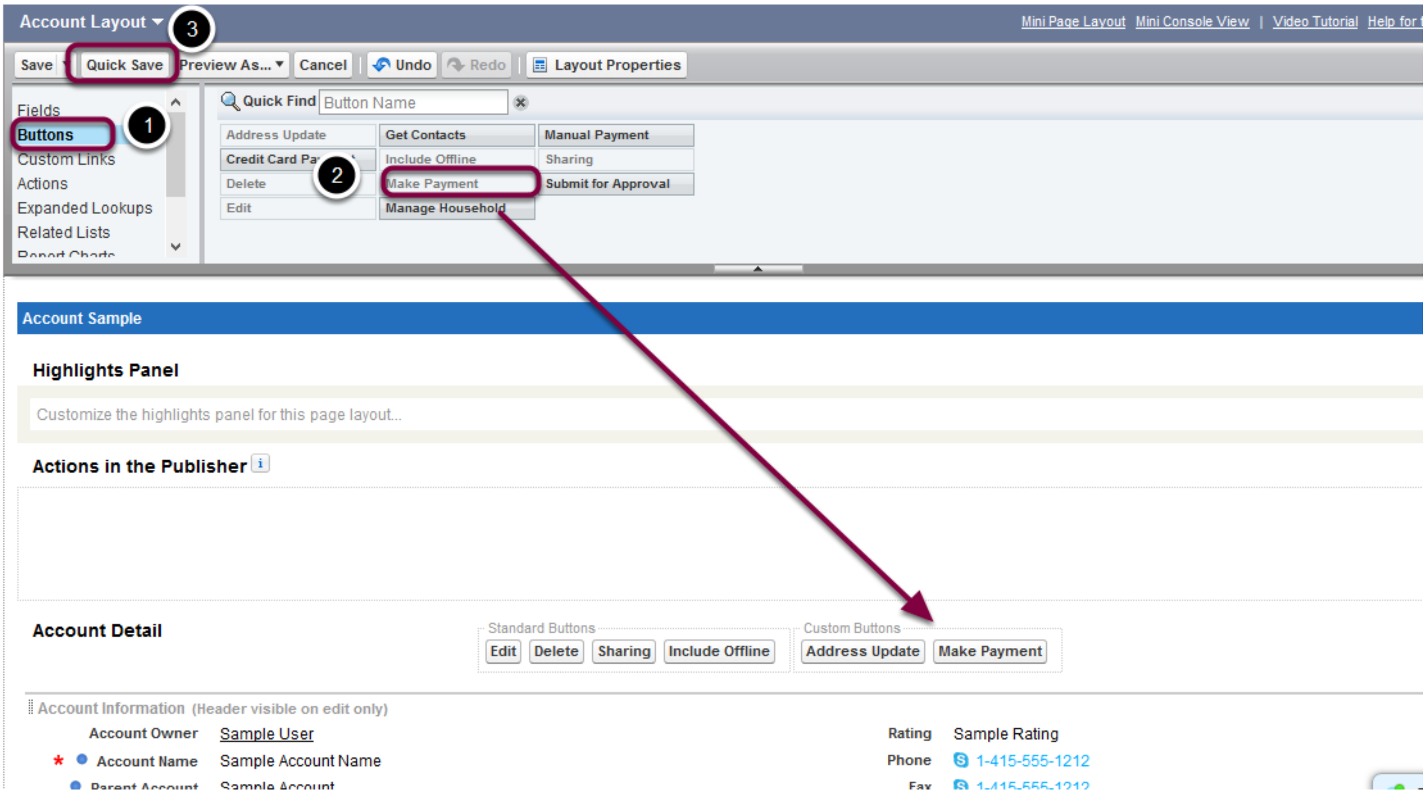
1. Adding Make Payments Button to Accounts



Locate an Account in your organisation, click into the Account Detail, then click on the Edit Layout Link.

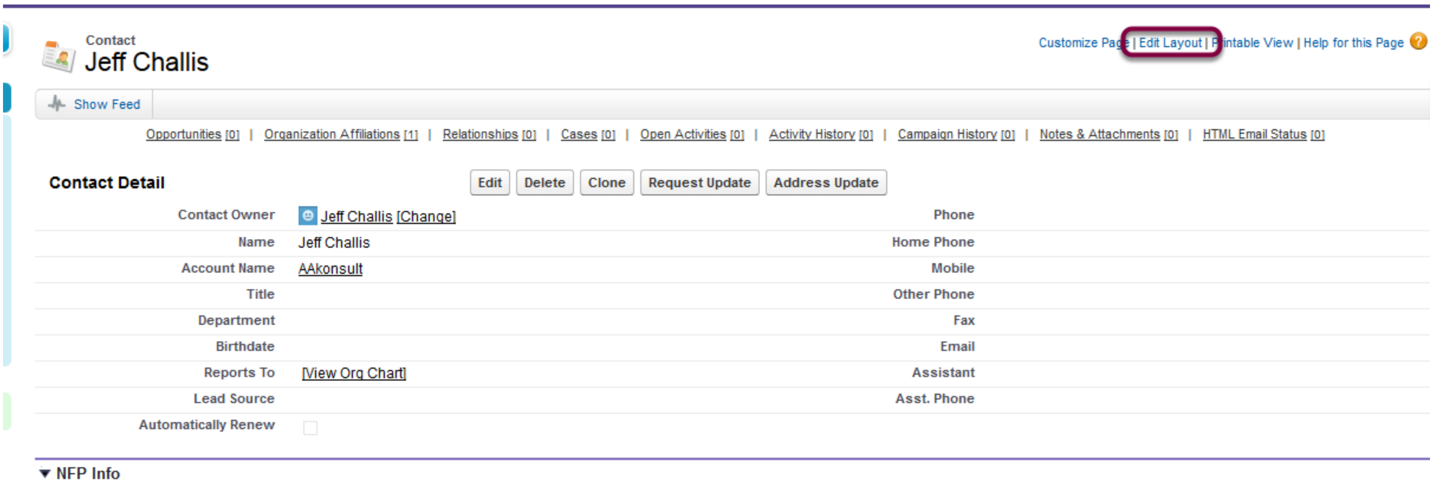
Alternatively, navigate to setup > Customize > Accounts > Page Layouts. Click edit next to the layout you wish to edit.

1.1 Add Make Payment Button to layout



1. Click on the Buttons Link
2. Drag/Drop Make Payments Button onto your form
3. Press Save button

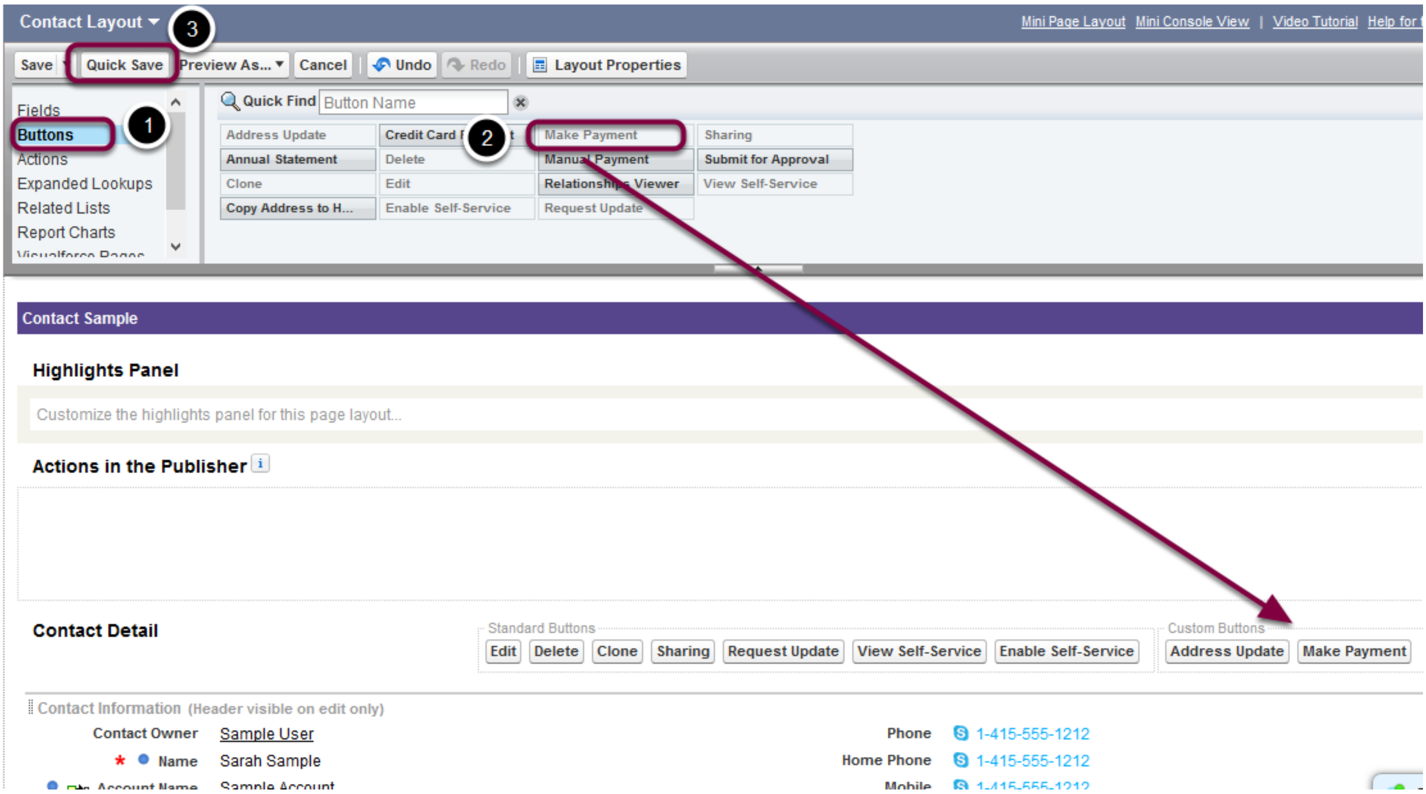
2. Adding Make Payments Button to Contacts



Locate an Account in your organisation, click into the Account Detail, then click on the Edit Layout Link.

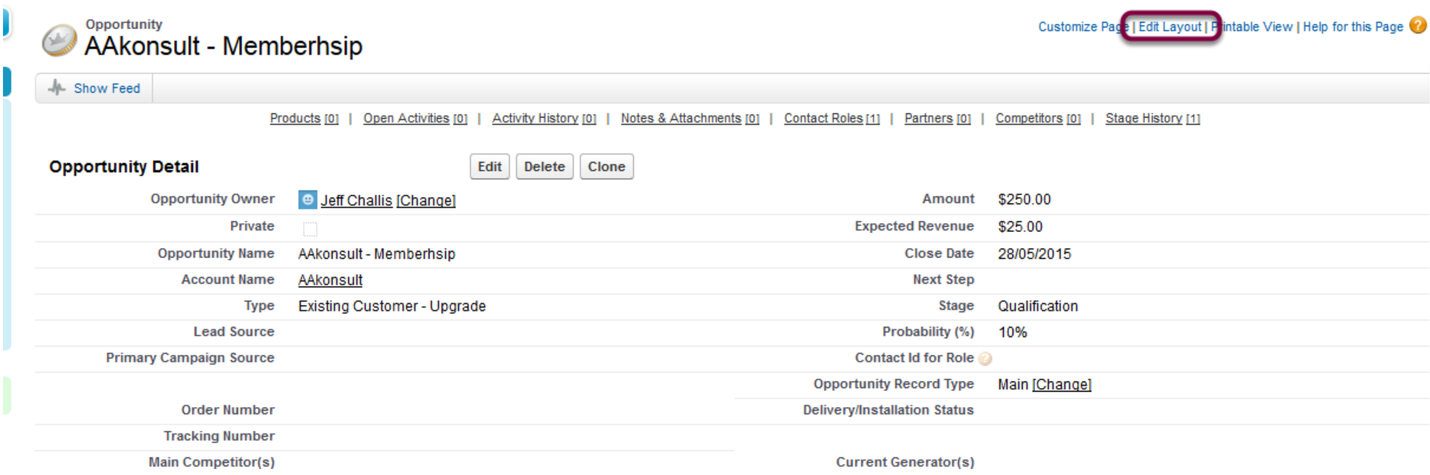
Alternatively, navigate to setup > Customize > Contacts > Page Layouts. Click edit next to the layout you wish to edit.

2.1 Add Make Payment Button to layout



1. Click on the Buttons Link
2. Drag/Drop Make Payments Button onto your form
3. Press Save button

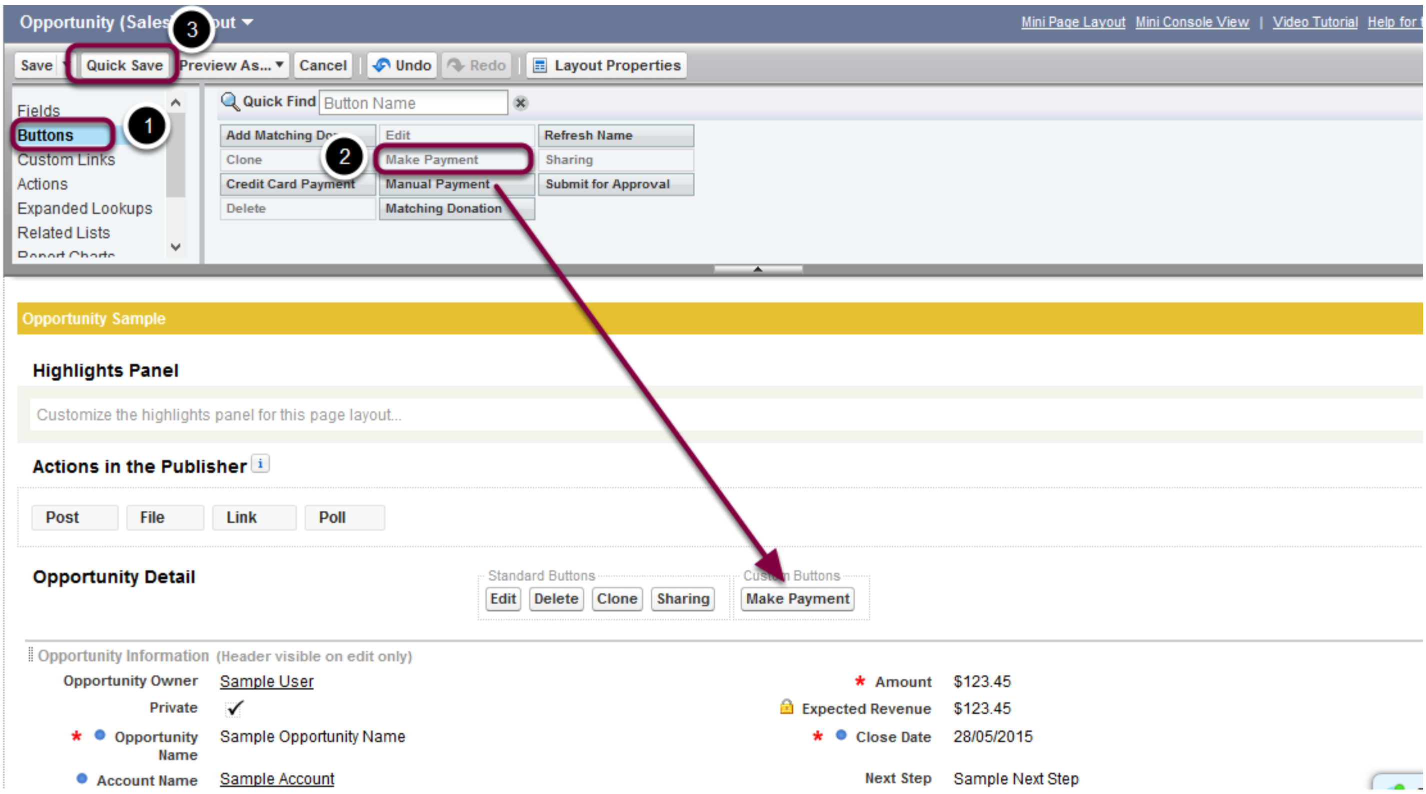
3. Adding Make Payments Button to Opportunities



Locate an Account in your organisation, click into the Account Detail, then click on the Edit Layout Link.

Alternatively, navigate to setup > Customize > Opportunities > Page Layouts. Click edit next to the layout you wish to edit.

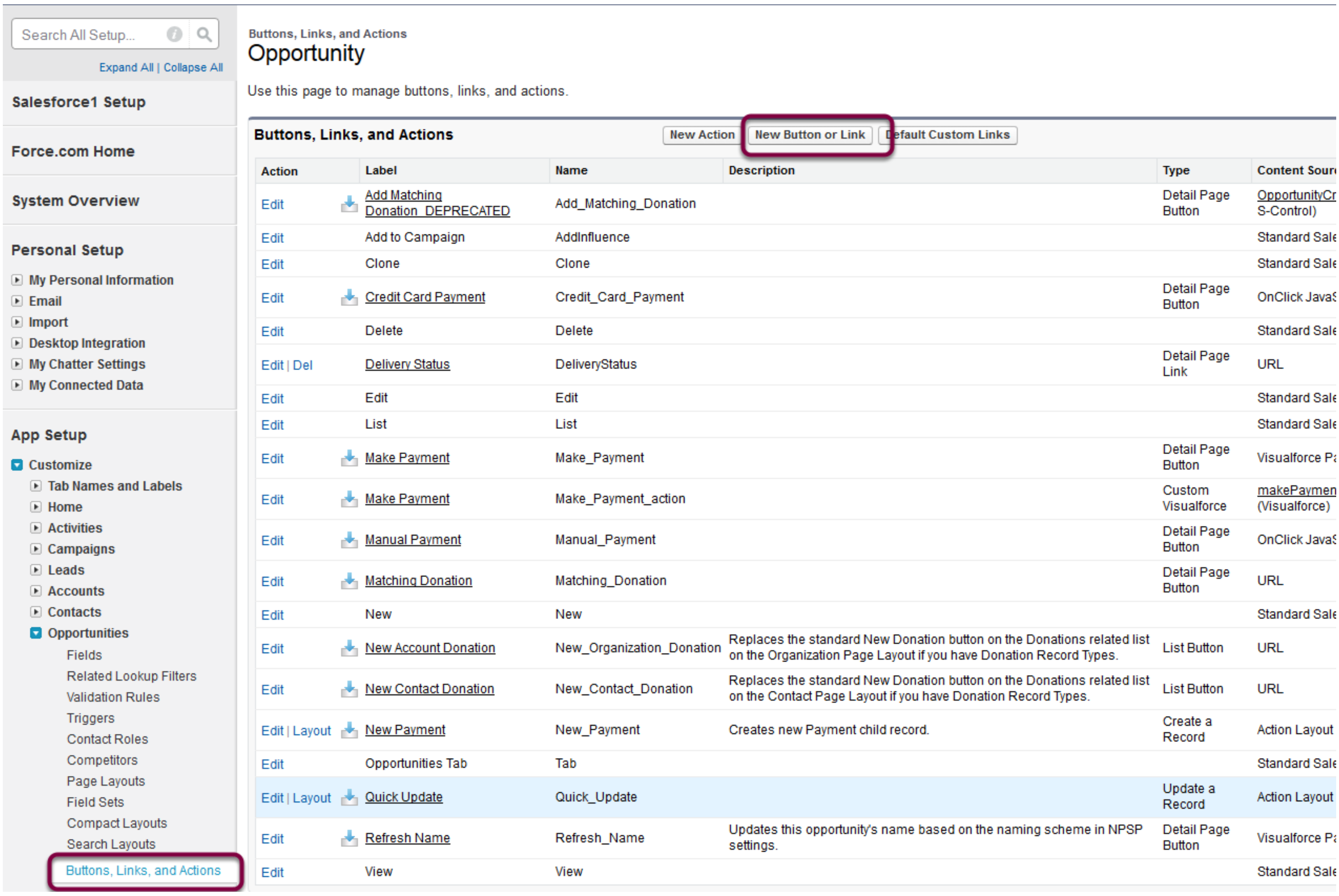
3.1 Add Make Payment Button to layout



1. Click on the Buttons Link
2. Drag/Drop Make Payments Button onto your form

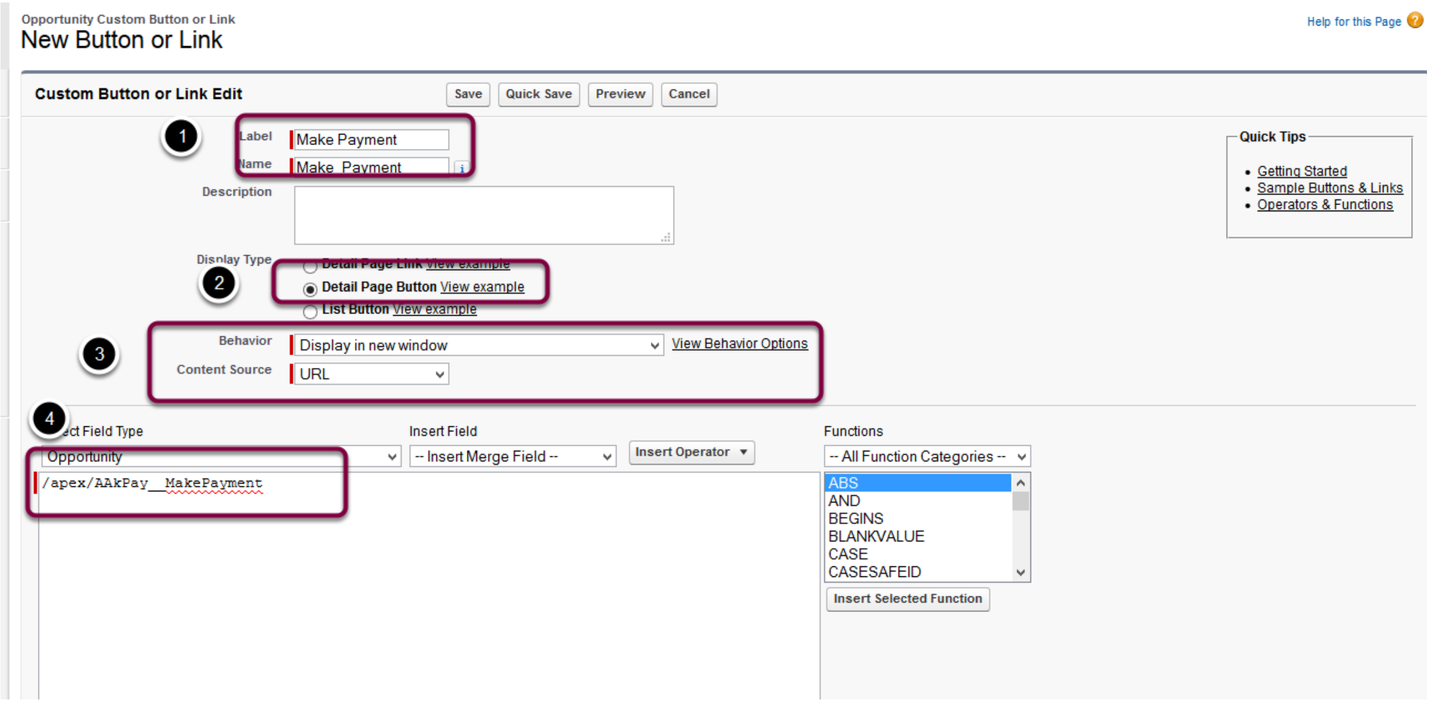
3. Press Save button

4. Custom Make Payment or Adding to any Object



1. Navigate to setup and section for adding a new button. For example on Opportunities, navigate to setup > Customize > Opportunities > Buttons and Links.
2. Press the New Button on Link button

4.1 Add custom make payment button details



1. Give the button a name
2. Select button if you wish to use a button on the page
3. Select to open in a new window (or you can use existing window with no sidebars or headers)
4. Enter the URL of "/apex/AAkPay__MakePayment"
   You can also use Make Payment URL Parameters here, such as ?hideCheckout=true. So the value entered would be /apex/AAkPay__ManualPayment?hideCheckout=true
   See Make Payment URL Parameters for more information.
5. Save the form. Don't forget to add the new button to the page layout (See the previous sections for adding make payments to the page layouts for guidance)

5. Make Payment URL Parameters

The Make Payment URL Parameters provide options that enable you to tailor how the button operations.

There are entered as part of the URL when creating a custom make payment button.

Options are:

- oppid=xxxx : Links the make payment to an opportunity id (xxx = an Opportunity Record Id)
- aid=xxx : Links the make payment to a Account id (xxx = an Account Record Id)
- cid=xxx: Links the make payment to a Contact id (xxx = an Contact Record Id)
- hideCheckout=true: Hides any checkout (Credit Card) options from being displayed
- hideManual=true : Hides the manual payment options from being displayed
- hideRecurring=true : Hides the recurring payment options from being displayed

- hideRenewal=true: Hides any subscription/membership options from being displayed
- paymentFor=xxxx : passes in the paymentFor reason. Especially useful when doing a Token Charge from an opportunity
- Amount=nnn : passes in the amount for the payment

How to setup Import Files Email Listner

Email to Import File

Import Files supports 3 modes of uploading files, these are:

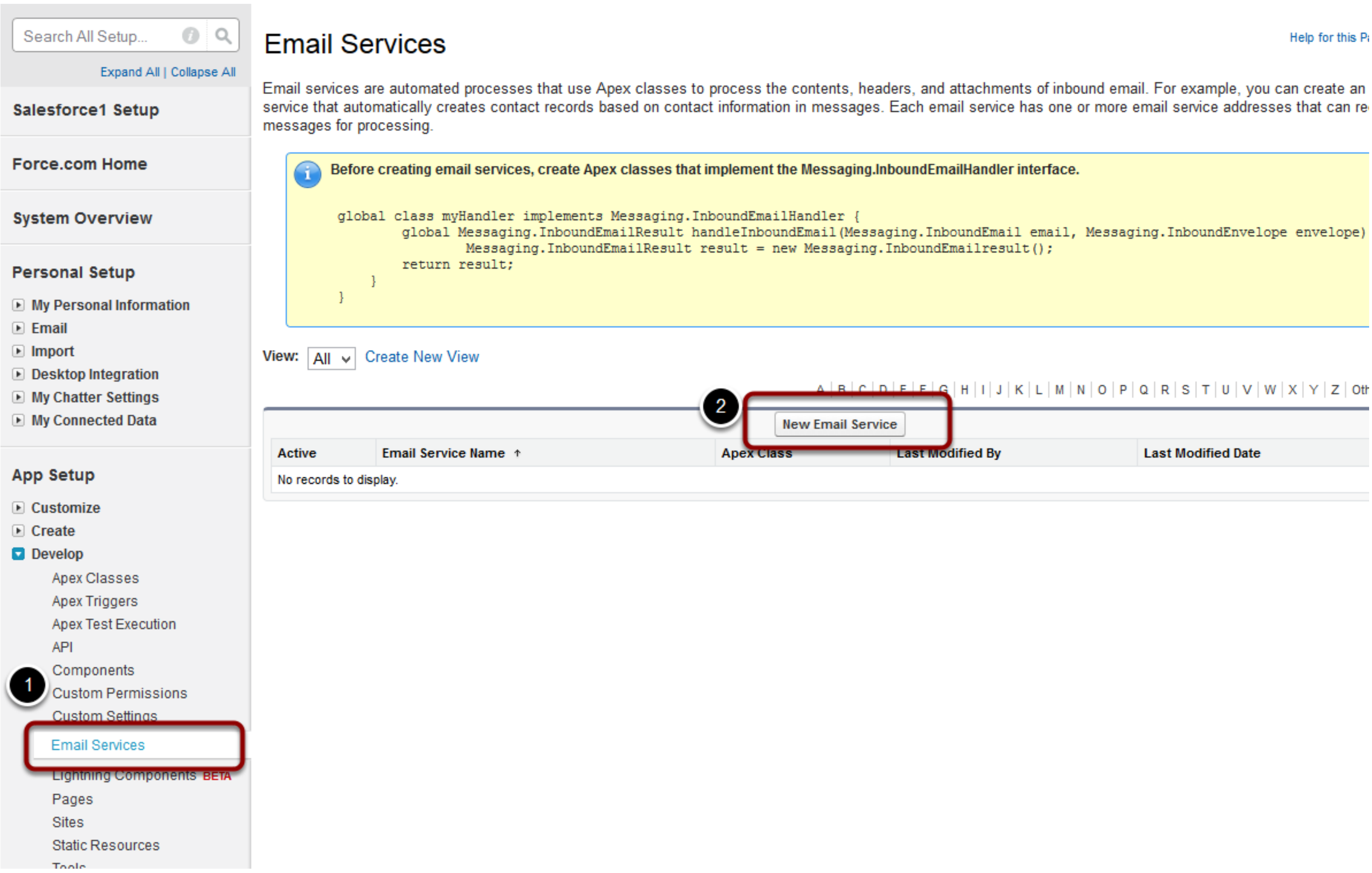
1. Upload from file on your PC/Mac
2. Copy/Paste
3. Email to Salesforce

In order to use the Import Files email-to-salesforce, you will need to setup the following:

- An Apex Email Listener for the importFileEmailListener Class

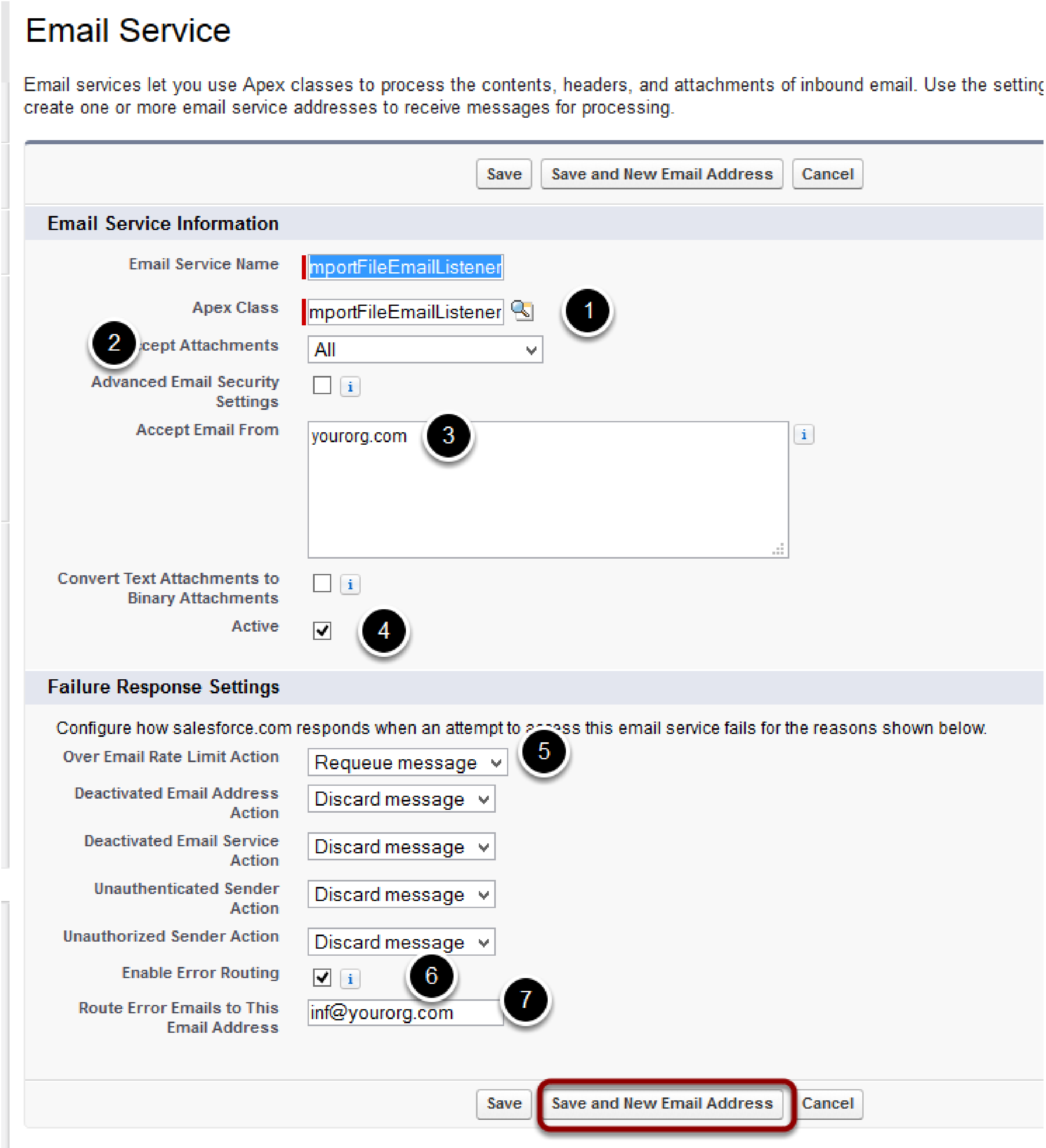
This procedure takes you through how to setup the email listener.

1. Add a new Email Service



Under Setup > Develop > Email Service. Click the New Email Service button

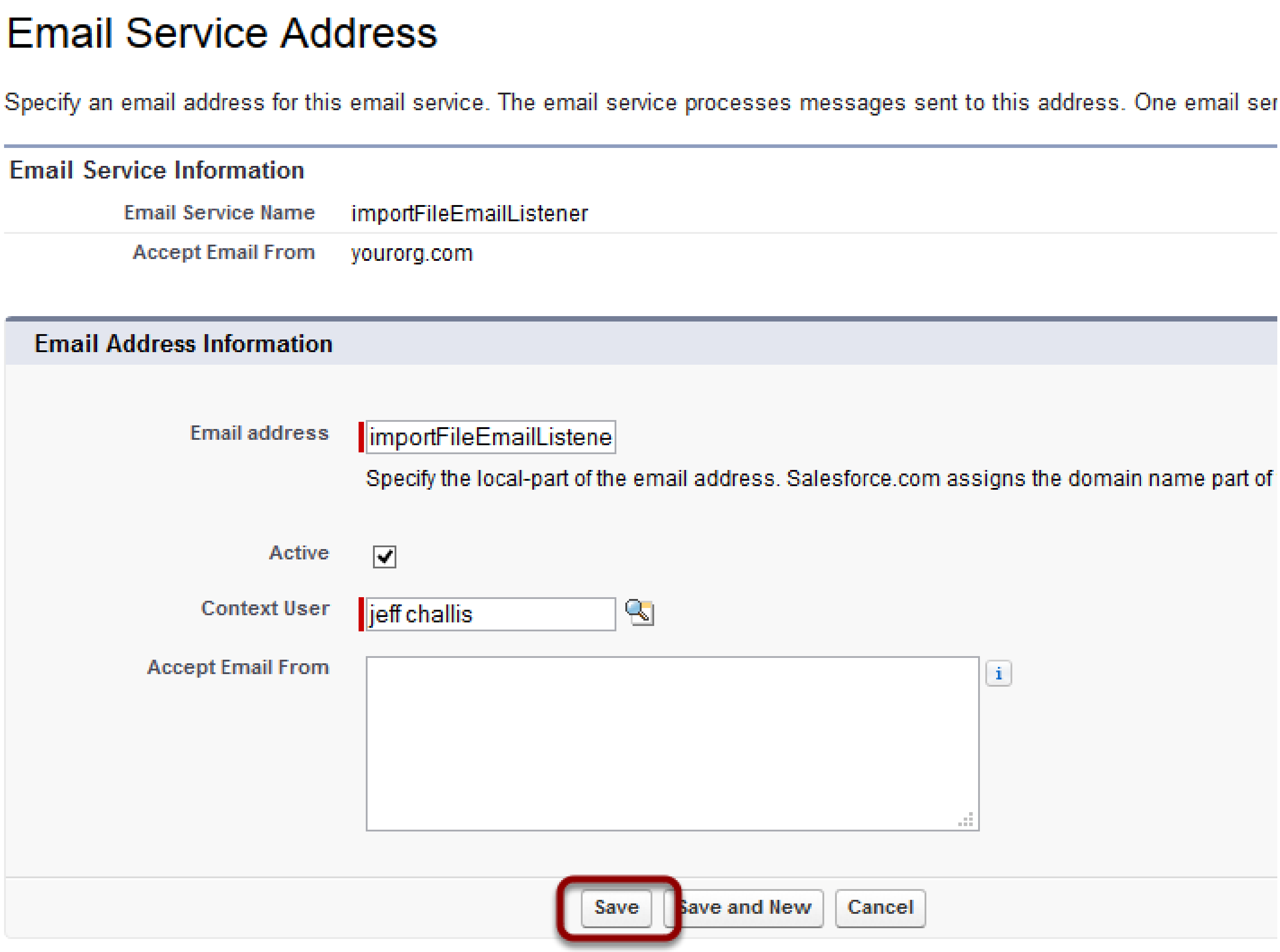
2. Link Email service to importFileEmailListener



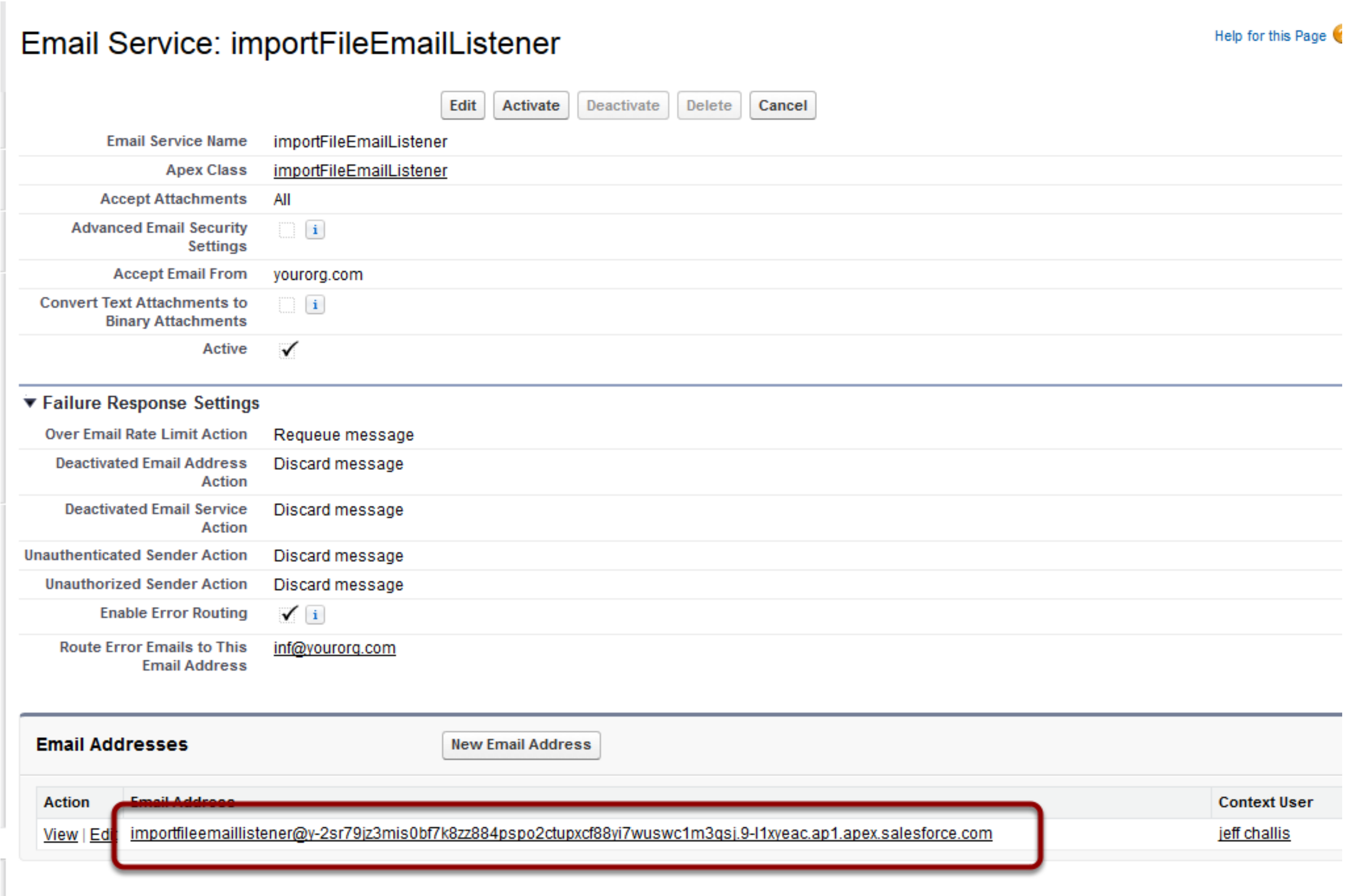
1. Ensure you link the service to the Apex Class: importFileEmailListener
2. Accept all attachments
3. Put authorised individual emails and/or your companies domain here. If the email is forwarded from a different email then it will not be accepted.
4. Requeue if you go over your daily limit
5. Enable Error Routing
6. Send any errors to a support person in your organisation.

Press Save and New Email address

3. Save the email address

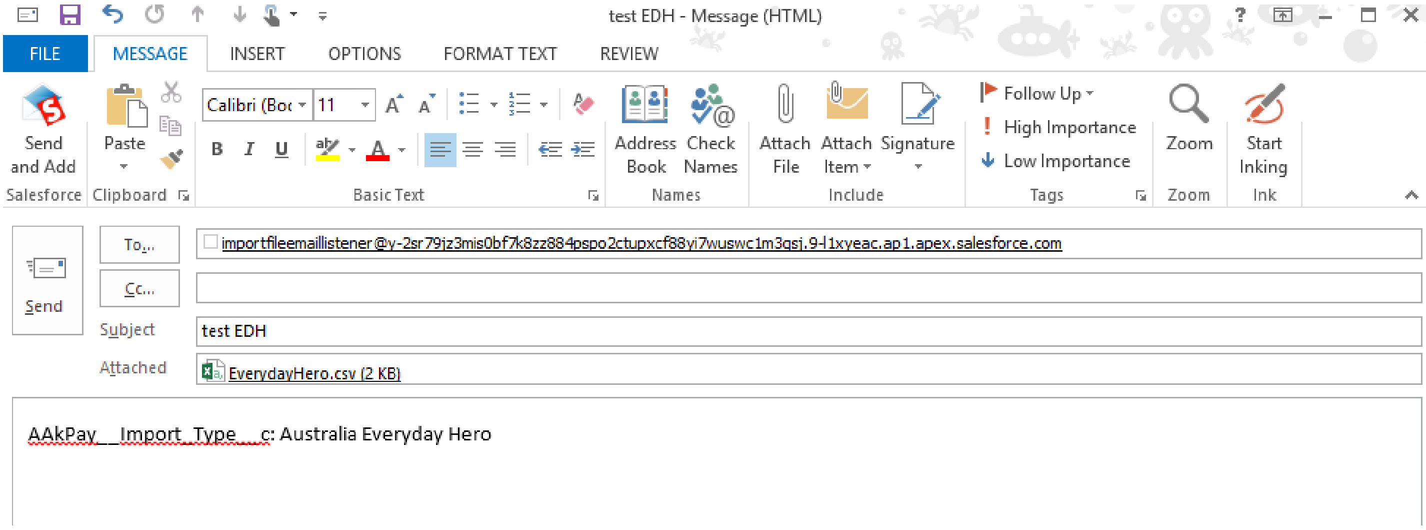


4. Copy email address for use



This is the email address that you can email details into

5. Send a test email



Send an email to the email address created in the previous step.

TIP: If you include in the body of the email "AAkPay__Import_Type__c: XXXX" where XXXX is the Import File objects - Import File Type picklist value, then this is the value that will be used for the upload.

For the technically minded, if you use the api_file_name:xxxx then this will work upload/apply this value for any field on the Import File Object

High Data Volume

How to deal with high volume data

1. Contact Salesforce.com if you know your organization will be using high volume account or contact data

High volume data = Account or Contact data over 100,000

2. Request custom indexing for the following fields:

- Accounts: AAkPay__ Account_Search_Name__c
- Contacts: AAkPay__ Phone_Search__c, AAkPay__MobilePhone_Search__c

3. If custom indexing is not set up, check for the following error message

"System.QueryException: Non-selective query against large object type (more than 100000 rows). Consider an indexed filter or contact salesforce.com about custom indexing."

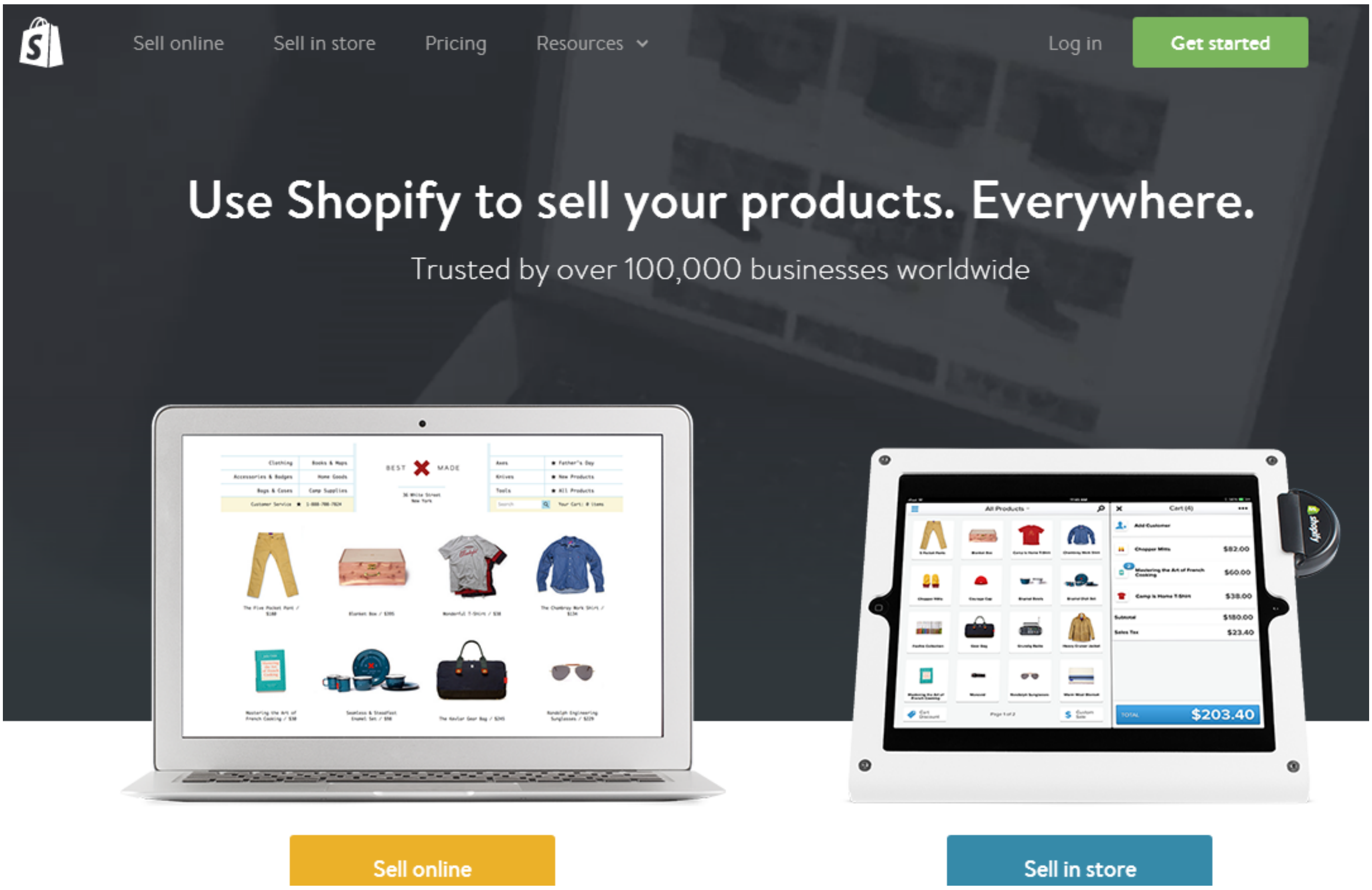
Shopify

How to set up Shopify

The Shopify Integration allows organisations to create an online shopping cart and to have orders that have been paid for details stored in salesforce.com. This provides a complete view of all purchases that a customer has made with your organisation.

1. Set up a Shopify account

1.1 Navigate to the Spotify website (link below)



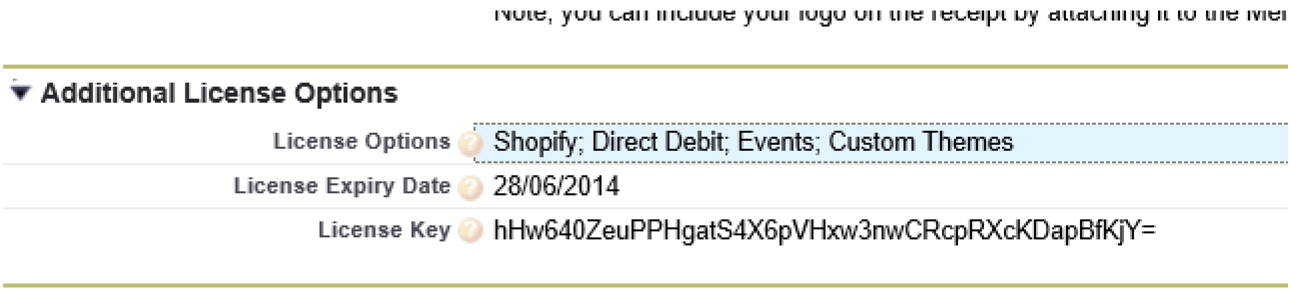
http://www.shopify.com/?ref=aakonsult-pty-ltd

1.2 Set-up an account that suits your organization's needs

2. Obtain a license key from AAkonsult

Contact AAkonsult - info@aakonsult.com

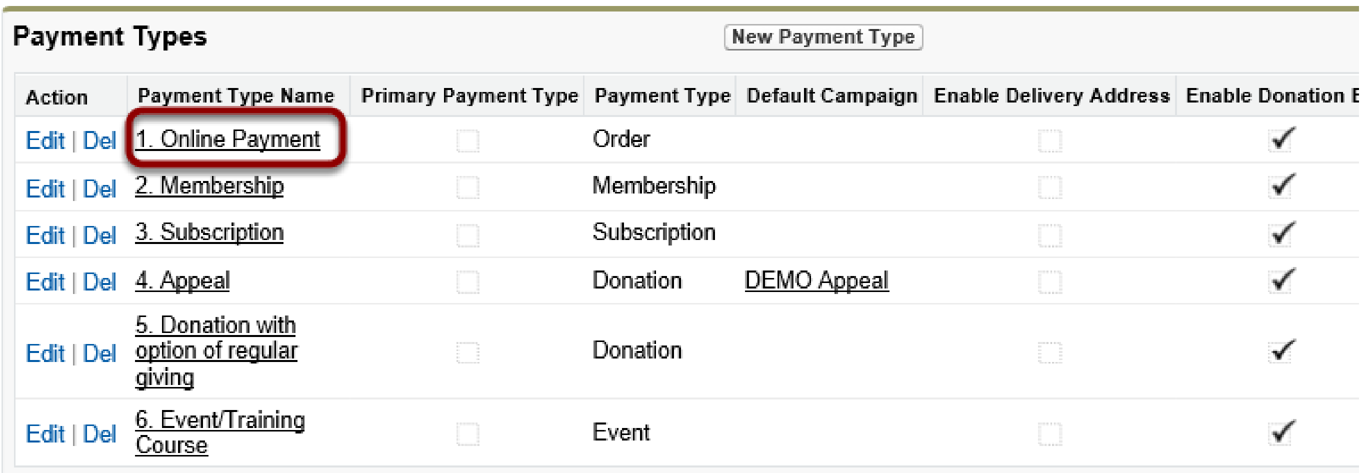
2.1 Enter your license details into the Merchant Facilities tab



3. Find the 'webhook' to link AAkonsult Payments to Shopify

3.1 Navigate to the Merchant Facilities Tab

3.2 Scroll down to 'Payment' Types and select the one you would like to integrate with Shopify



Payment Types — New Payment Type

Action	Payment Type Name	Primary Payment Type	Payment Type	Default Campaign	Enable Delivery Address	Enable Donation E
Edit | Del	1. Online Payment		Order			✓
Edit | Del	2. Membership		Membership			✓
Edit | Del	3. Subscription		Subscription			✓
Edit | Del	4. Appeal		Donation	DEMO Appeal		✓
Edit | Del	5. Donation with option of regular giving		Donation			✓
Edit | Del	6. Event/Training Course		Event			✓

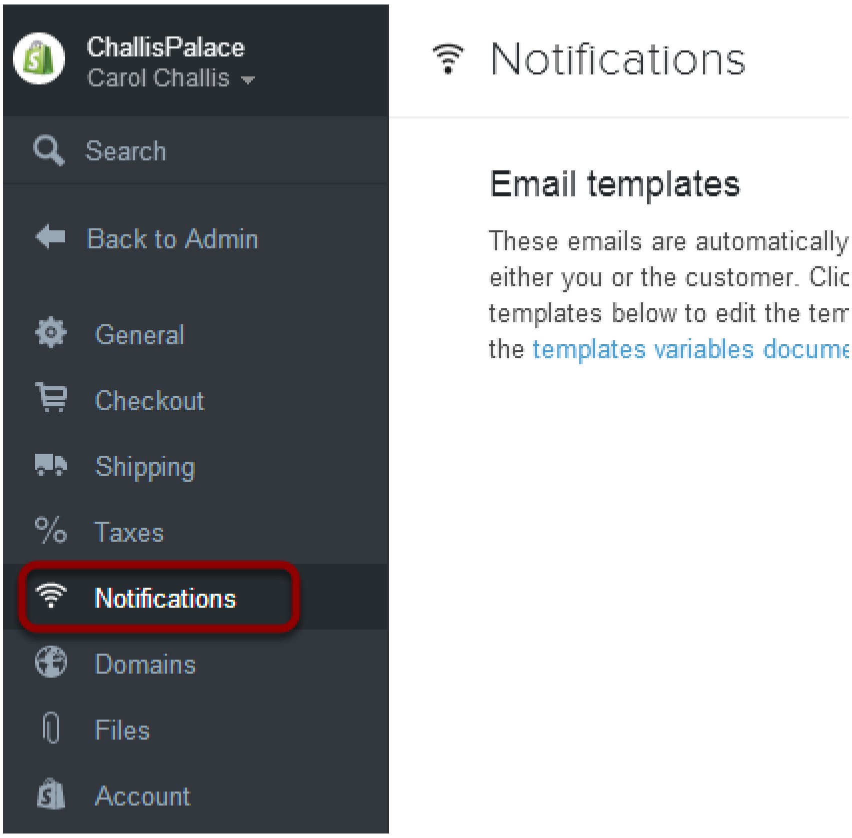
3.3 Scroll down and take note of the 'Shopify Webhook' URL

This URL will be required in your Shopify set up.

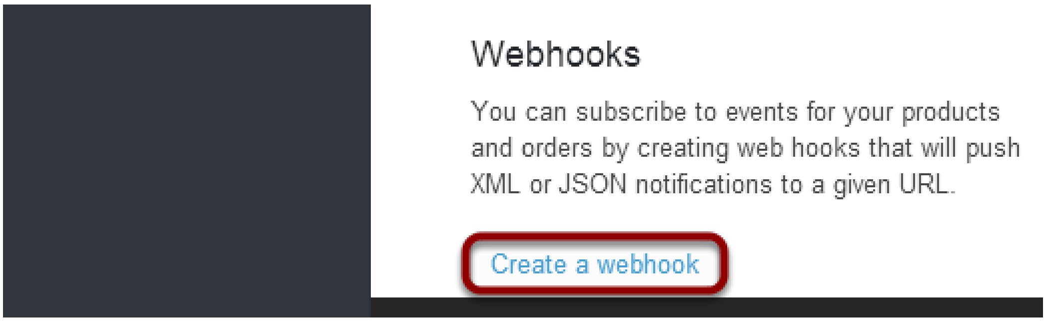
4. Integrate your Shopify account

Login to your Shopify account

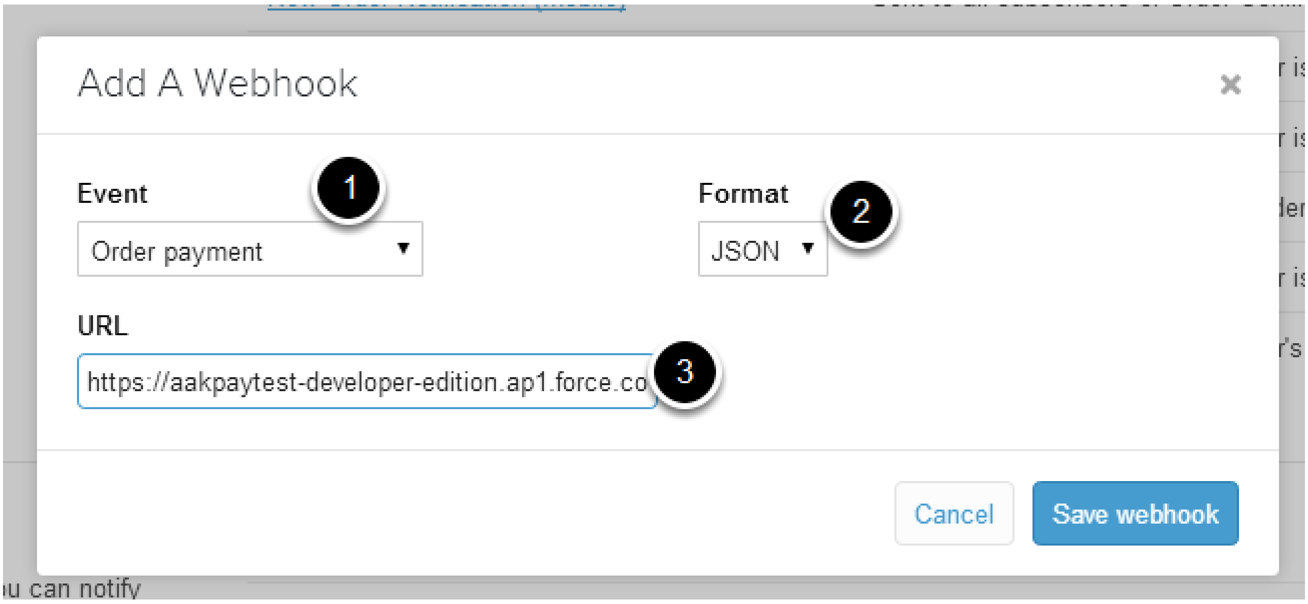
4.1 Navigate to Settings > Notifications



4.2 Scroll down to 'Webhooks' and select 'Create a webhook'



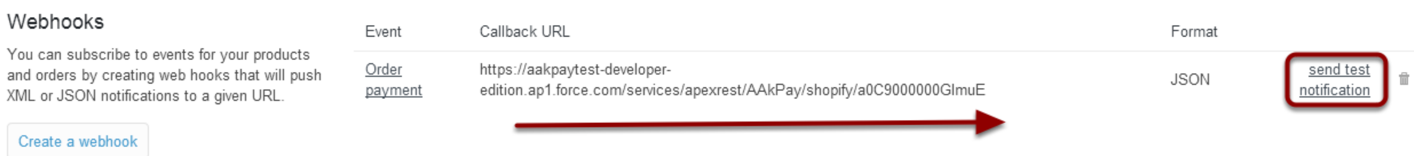
4.3 Fill in details and select 'Save webhook'



1. Select 'Order payment' from the drop down menu
2. Select JSON format
3. Copy & Paste the special URL from your AAkonsult Merchant Facilities tab

5. Test the integration

5.1 Select 'send test notification'



5.2 Check for a new transaction in the Payments Txn tab (AAkonsult Payments)

A new entry from 'Bob Biller' from 'My Company' will be created.

This could take a few minutes.

Website Setup

How to add your form to your website

The AAkonsult Payments forms can be added to your website in a number of ways. These methods available inlcude:

- Embedded using an iframe
- Embedded using a lightbox
- Launched from a button or a link

If choosing to embed the form, you may need to consider getting a security certificate for your website as the AAkonsult Payment form must be httpS for secure and if the surrounding website is not, then this may cause the user to receive a message saying mixed secure and non secure content. It might also lead the user to the perception that the form is not secure as they cannot see the secure padlock (even though the AAkonsult Payments part is)

Please consult the User Manual for more details in the following sections:

- How to publish a web form using URL tokens (preferred method)
- How to publish a web form

How to provide accessibility and text resizing

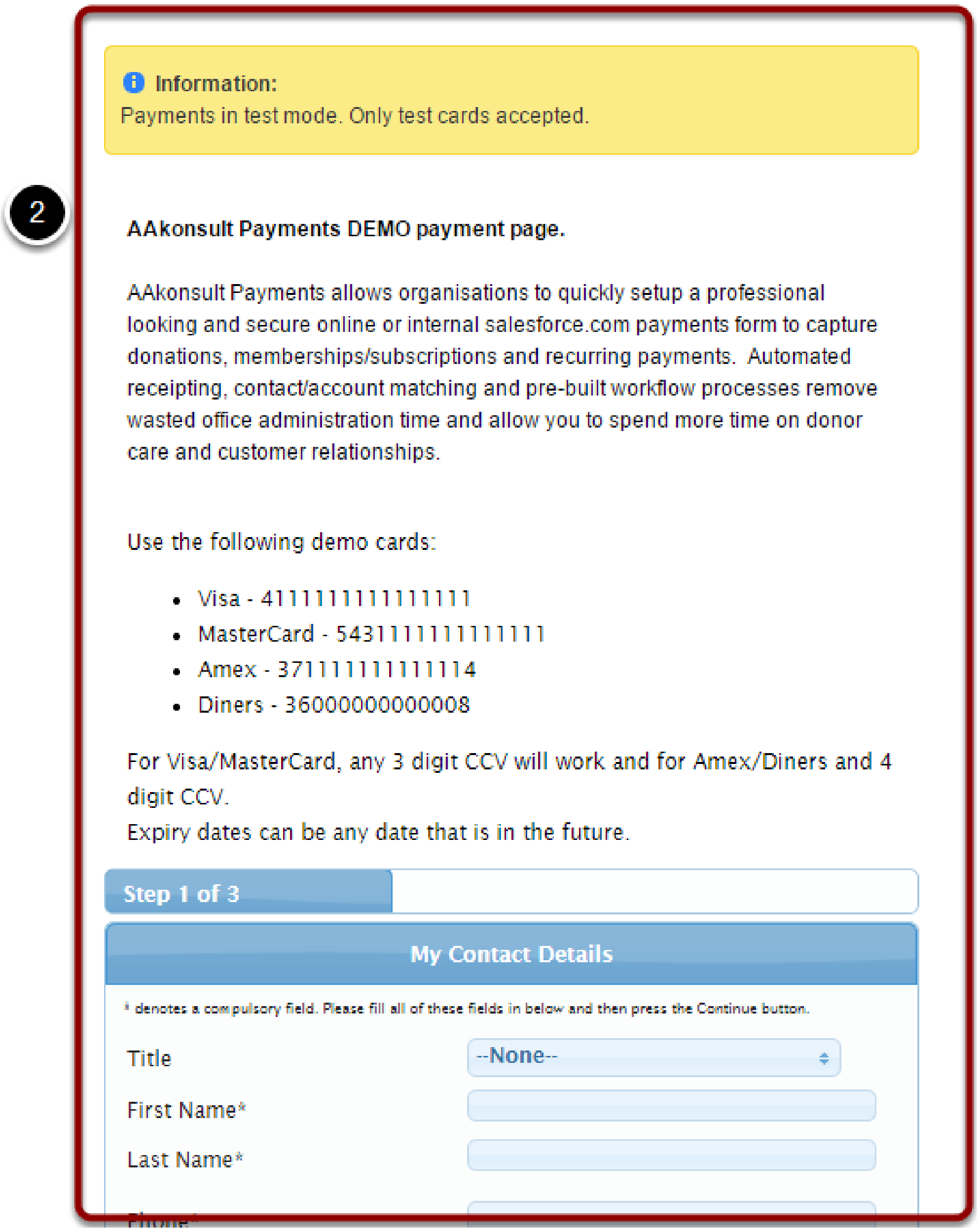
If your website provides the ability for users to adjust text sizes, then you can interface this with AAkonsult Payments.

This will require a technical resource to assist with the setup. In summary,we are using the javascript postMessage listener in the iframe to receive details of the user selected font size.

The following external forms support font resizing:

- Checkout

1. Website communicating with iframed form



In the above example, the font size selector (1) is part of the main website CMS. The AAkonsult Payments form (2) is iframed in.

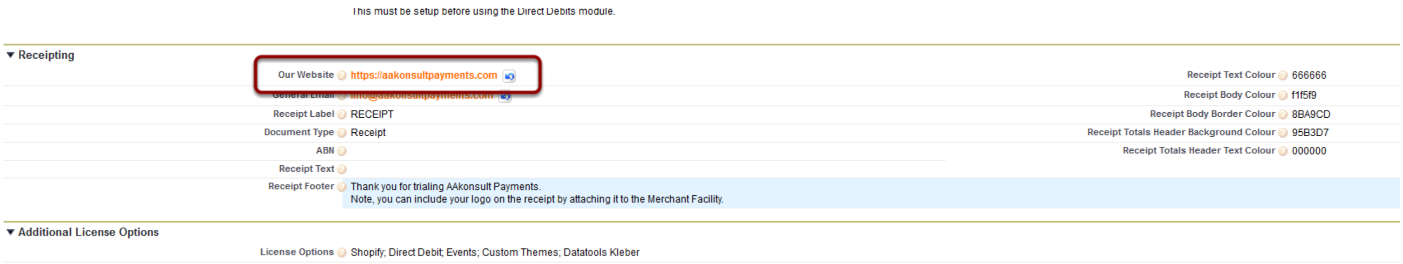
2. postMessage Javascript setup

```
<style>
   .textResize {
      font-size:12px;
      font-family: Arial, Helvetica, sans-serif;
   }
   .textResize a {
      padding-right:10px;
   }
   .textResize a:hover {
     cursor: pointer;
   }
</style>

<script>
function changemysize(fontSize) {
    // var win = document.getElementById("theFrame").contentWindow;
    var pMSG  = {fontSize : fontSize};
    var pMSGStr = JSON.stringify(pMSG);
    var myIframe = document.getElementById("theFrame");
    var win = (myIframe .contentWindow || myIframe .contentDocument);
    win.postMessage(
      pMSGStr,
      "*"
    );
}
</script>

<div class="textResize">Choose font size: <a style="font-size: 0.9em; margin-left: 10px;" onclick="changemysize('0.9em');">A</a> <a style="font-size: 1.0em;" onclick="changemysize('1em');">A</a> <a style="font-size: 1.1em;" onclick="changemysize('1.1em');">A</a> <a style="font-size: 1.2em;" onclick="changemysize('1.2em');">A</a> <a style="font-size: 1.3em;" onclick="changemysize('1.3em');">A</a> <a style="font-size: 1.4em;" onclick="changemysize('1.4em');">A</a> <a style="font-size: 1.5em;" onclick="changemysize('1.5em');">A</a> <a style="font-size: 1.6em;" onclick="changemysize('1.6em');">A</a></div>
<!-- key is to keep closing frame in closing tag.-->

<iframe id="theFrame" src="https://s[redacted]eloper-edition.[redacted]force.com/" width="100%" height="3200px" frameborder="0" seamless=""></iframe>
```

An example of the javascript code using the sample page is shown above.

1. The iframe of the AAkonsult Payments Form. Note the id="theFrame" tag
2. The <div>'s show the text size and have an onclick event. This event calls the "changemysize" function and passes in the size. Note, the size is in "em".
3. The change my function creates an object with the font size that was passed in. This then converts the object into a JSON string
4. postMessage is used to communicate with the iframe. Note the iframe element is retrieved by the "theFrame" id attribute as noted in step 1.

3. Merchant Facility Our Website setup



For security reasons, the website that is hosting using the postMessage must be secure and using https.

Also, the post message is checking the origin and this MUST match the domain that is passing in the new font size. This domain is setup inside Salesforce on the Merchant Facility tab.

To do this update, in Salesforce navigate to the "+" at the end of the tabs, then click into Merchant Facility. Press GO button and for each Merchant Facility, scroll down to the Receipting section and update the "Our Website" field to have your domain. Please be sure to include the "https" part.

Implimentation Tips

How to Upload Recurring Credit Card Payments

This procedure is for organisations that already have a list of regular Credit Card donors / payments and want now use AAkonsult Payments to process them.

This guide is for intermediate or advanced administrator level. Should you need assistance, you can engage AAkonsult Professional Services by contact us at info@aakonsult.com

1. Create Recurring Payment Records

Import details in AAkPay__Recurring_Payment__c

- Status “Inactive”
- Frequency “Eg. Monthly”
- Amount and/or Donation Amount. If you don't have a value for one of this fields, please upload with 0.
- Record TypeId for "Credit Card"
- Contact Id
- Account Id
- Name (You can generate this – eg. Persons Name)
- Last Payment Date – when they last paid (or set to todays date if not known). Please note, this is important as missing very old dates may cause catch up transactions
- Next Payment Date (Date next due – eg. 16/4/2015)
- Expiry date and Expiry date MMYYYY (eg. 112015 for November 2015

Keep in mind that after the upload, you'll need to link the created Recurring Payment - record id with the Credit Card number and CCV that you have.

2. Exporting for Tokenisation

Once you have an Activate Payment Gateway, you'll need to contact AAkonsult and request the bulk tokenisation feature be turned on.

We now need to export from Salesforce so we can prepare a CSV file for bulk tokenising. You can do this by running a report on the "Recurring Payment" object and then exporting the details. Make sure you include:Export AAkPay__Recurring_Payment__c.id (record id), Expiry MMYYYY.

Now that you have the details from Salesforce, you'll need to make sure you link the exported information with your Credit Card numbers. Excel Vooklookups are good, but watch out for the credit card numbers going into exponential format.

3. Tokenising the Credit Cards

This process takes the Credit Card numbers, uploads them into Payment Express and then returns a token that we can then use for billing/charging to at a later date.

Before starting this step, you'll need to have an Active Payment Express Account (Contact AAkonsult for this - DO NOT go directly to Payment Express). You'll also need to contact AAkonsult and ask for the bulk tokenisation feature to be enabled.

NOTE, when dealing with lists of credit cards:

1. NEVER email the list of cards to anyone (including fellow work mates)
2. NEVER open/save with XLS (this will turn the card numbers into exponential format).

When getting an AAkonsult Payments - Payment Express account, there are two usernames/ passwords. One is for Salesforce and the other is for PayLine (Online/web access). It is the Payline account that is used here.

You need to create a CSV file needs to following specifications: https://www.paymentexpress.com/Technical_Resources/Other_Components/Payline_Batch_Processor Please see the “Authorisation transactions” transaction section as that is the one we need to get the tokens. For the ref, use the contactId or even the recurring payment id (as extracted in step 2)

For the “Account” column, please contact AAkonsult support@aakonsult.com for details

Process and generate the Tokens:

1. Log into Payline
2. Upload the CSV file for bulk tokenisation
3. Wait for the process to complete, then download from the reports section

4. Upload Token into Salesforce

The CSV file generated in step 3 contains the Recurring Payment Record id (Reference) and Token.

Use these details to update the dpsBillingId in Salesforce