

INSTALLATION MANUAL



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Introduction

Legal Information

Proprietary Statement

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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 [Salesforce](#):

- 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 to 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 specify that you need an 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 are 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 for 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 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 to use AAkonsult Payments, you need to have both a [Payment Gateway](#) and a [Merchant Facility](#).

If your location is in the US/Canada 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

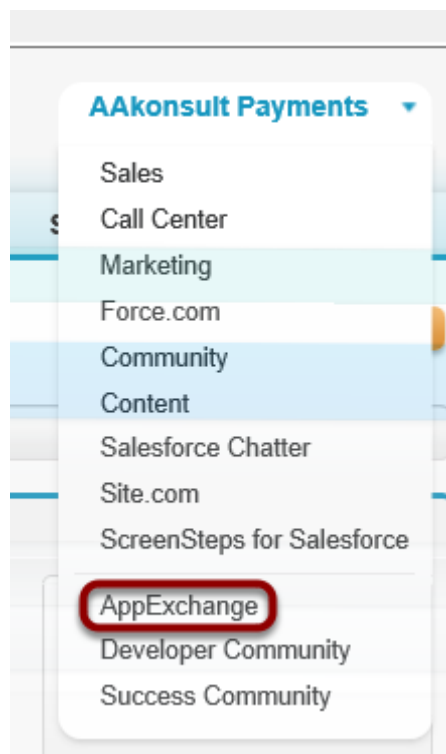
Before installing AAkonsult Payments from the AppExchange, check you have the following - Developer Edition (DE), Enterprise Edition (EE) or Unlimited Edition (UE) of Salesforce

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

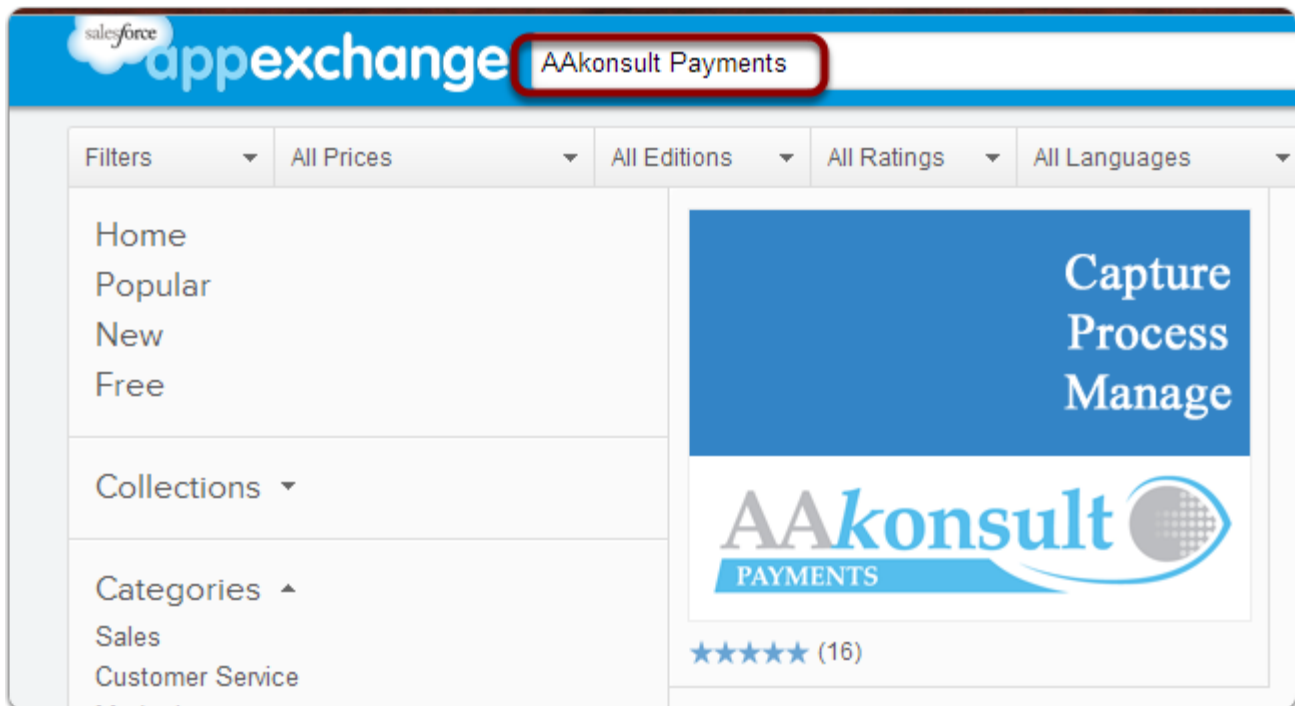
2. Navigate to the AppExchange - www.appexchange.com

Or you can go to the AppExchange 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.

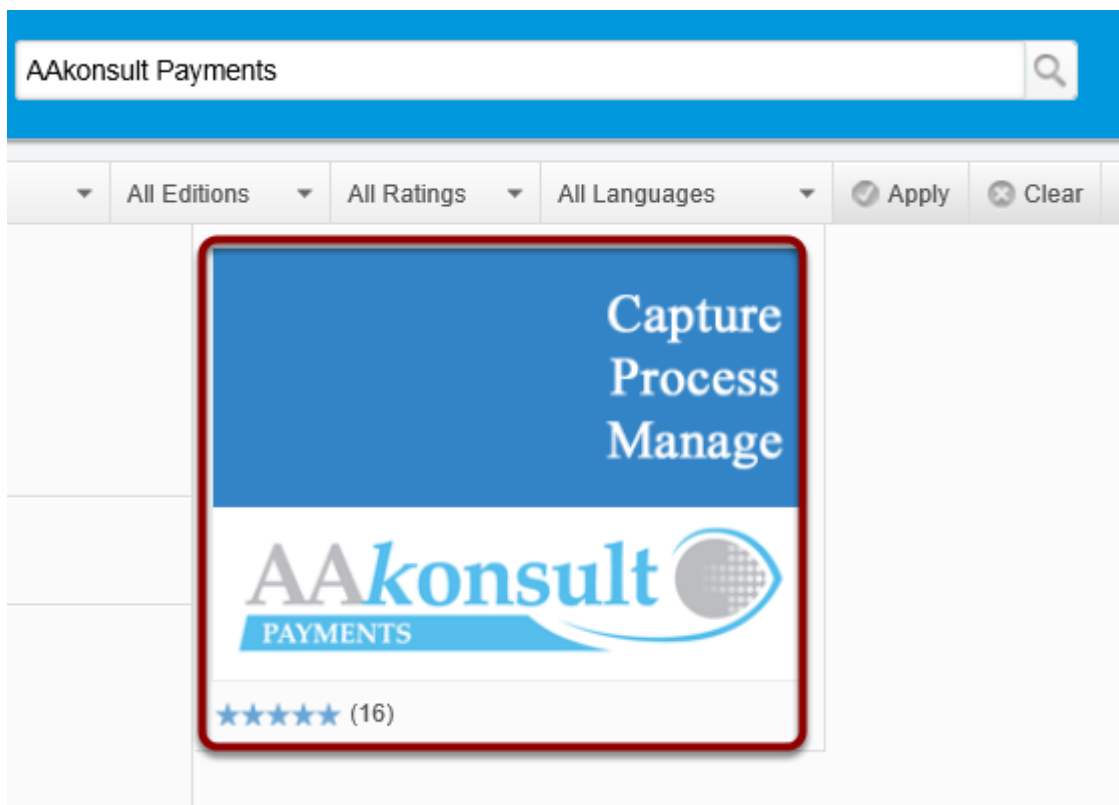


2.2 Search for our application 'AAkonsult Payments'



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

To get this app, select one of the below options


Log in to the AppExchange
Use your Salesforce credentials


I don't have a login
Continue as a guest

Even if you plan to install into your sandbox, first login to the AppExchange using your production credentials.

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


How would you like to continue?

 **Install in production**
Includes active, trial or developer orgs

 **Install in sandbox**
Test in a copy of your production org

3.5 Confirm and install your choice

Almost there!

 Before installing, please review the [customization guide](#) to familiarize yourself with the installation and configuration steps for this application.

WHAT YOU ARE INSTALLING	WHERE YOU ARE INSTALLING
PACKAGE AAkonsult Payments : Online Payments, Memberships, Events & Receipting	ORGANIZATION AAKonsult
VERSION AAkPayments (3.14 140503 / 3.14.0)	EDITION Developer
SUBSCRIPTION Free Trial	USER NAME carol@74demo.com
DURATION 45 Days	
NUMBER OF SUBSCRIBERS Site-wide	

1

☐ I have read and agree to the [terms and conditions](#) .

[Cancel Install](#) | [Back to previous step](#)

2 **Confirm and Install!**

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

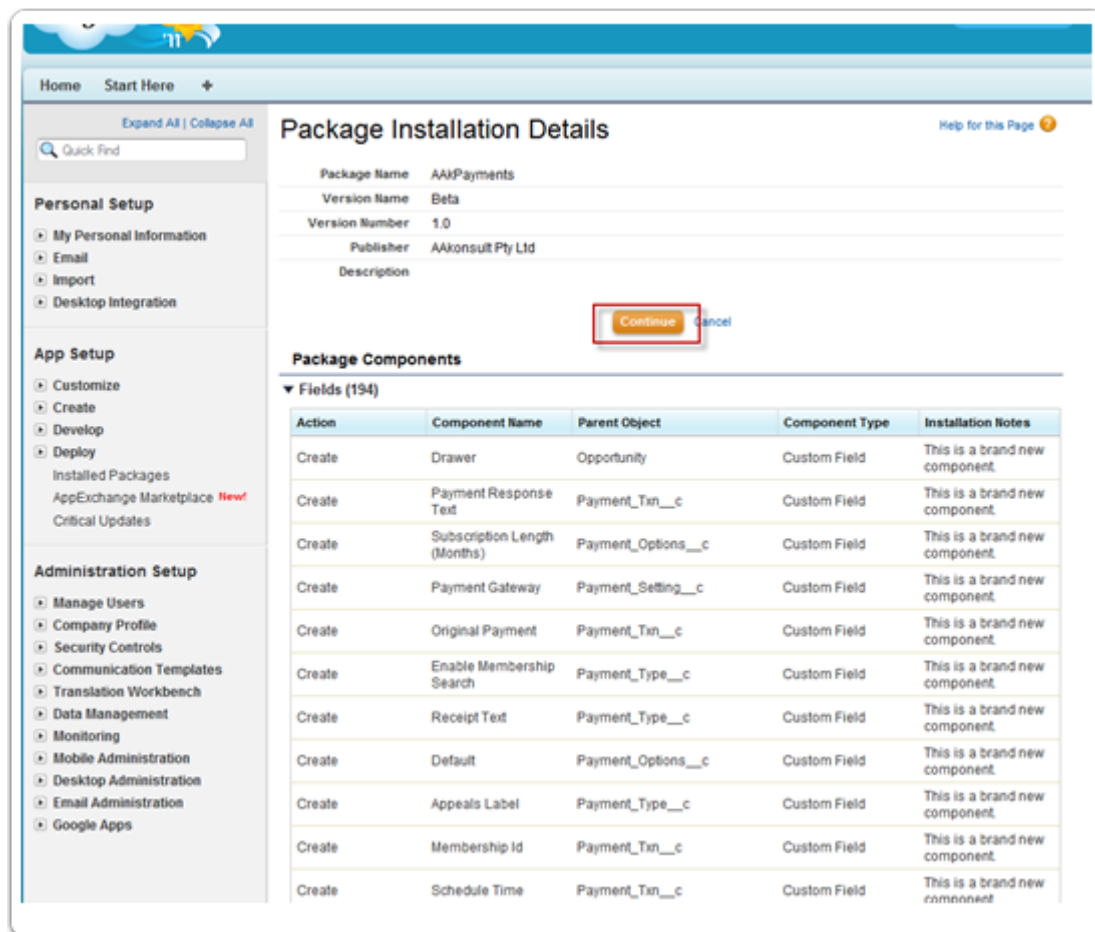
4. Follow the Salesforce Installation Wizard

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



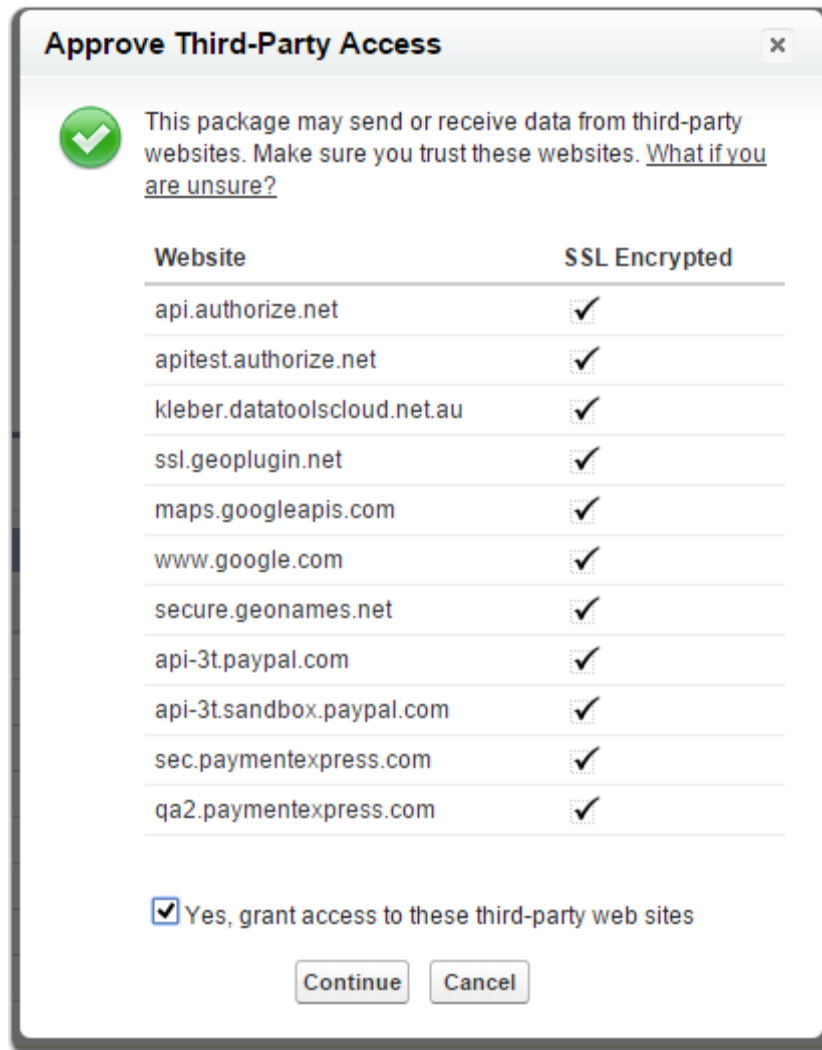
After clicking on the user, please wait while Salesforce loads the Installation Wizard.

4.2 Click on 'Continue'



This step lists the components that are being brought into your Salesforce 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'

Package Installer
AAkPayments
Help for this Page

Step 1. Approve Package API Access
Step 1 of 3

These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. [Tell me more](#)

Package Custom Objects

This Package will have the user's access (via the API) to all Custom Objects in your Organization.

Extended Object Permissions

	Read	Create	Edit	Delete		Read	Create	Edit	Delete
Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ideas	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Assets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Leads	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Campaigns	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Opportunities	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cases	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Price Books	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Products	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contracts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Push Topics	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Solutions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

General User Permissions

This Package will be able to use all of the General User Permissions from the user's Profile.

Administrative Permissions

This Package will be able to use all of the Administrative Privileges from the user's Profile.

Next
Cancel

These settings can be changed after installation

4.5 Choose your security settings

The screenshot shows the 'Package Installer' window for 'AAkPayments'. It is at 'Step 2 of 3: Choose security level'. Under 'Select security settings:', there are three radio button options: 'Grant access to admins only' (selected), 'Grant access to all users', and 'Select security settings'. Each option has a description: 'Users with your profile get full access (best for limited deployments)', 'All internal custom profiles get full access', and 'User access set by profile (recommended for most packages)' respectively. At the bottom right, there are 'Previous', 'Next' (highlighted with a red box), and 'Cancel' buttons.

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

The screenshot shows the 'Package Installer' window for 'AAkPayments' at 'Step 3 of 3: Install Package'. The main text says 'The package is ready to be installed. Click Install to continue.' At the bottom right, there are 'Previous', 'Install', and 'Cancel' buttons.

4.7 Await email notification when install is complete

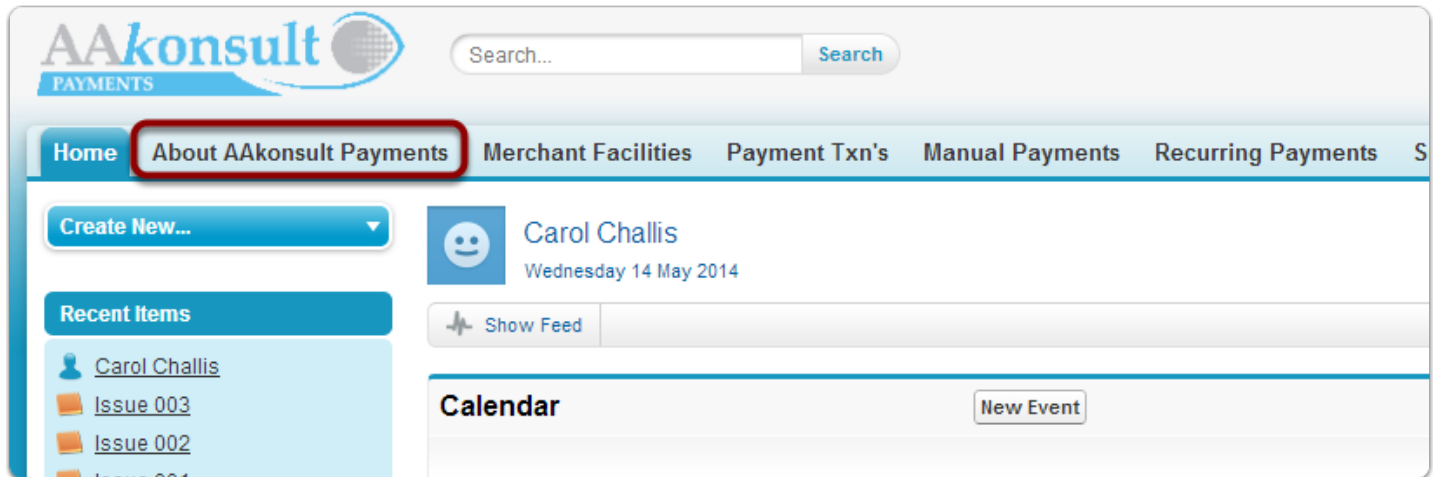
The screenshot shows the AAkonsult Payments web application. The header includes the logo, a search bar, and navigation links: Home, About AAkonsult Payments, Merchant Facilities, Payment Txn's, Manual Payments, and Recurring. A 'Create New...' button is visible. The main content area shows a 'Processing' status with a house icon and the text 'Your request is in progress. You will be notified by email when it completes.' Below this, there is a 'Recent Items' section with a 'Bright Sparks' item.

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 a 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)

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 - 360000000000008

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

First Name*

Last Name*

Phone

Mobile Phone

Email

Street

Suburb/Town*

State

Postcode

Country

Transaction Details

Payment Amount

Payment By ☒ Individual ☐ Company

My Payment Details

Total Amount Charged \$1,000.00

Credit Card Type ☒ Visa ☐ MasterCard

Cardholder Name*

Credit Card Number*

Expiry Date* /

CCV* [What's this](#)

Comments*

Step 1 of 3

[Continue](#)

Use the following demo cards:

- Visa - 4111111111111111
- MasterCard - 5431111111111111
- Amex - 371111111111114
- Diners - 360000000000008

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)

My Payment Details

Total Amount Charged

\$1,000.00

Credit Card Type

☒ Visa ☐ MasterCard

Cardholder Name*

Jeff Challis

Credit Card Number*

****_****_****_1111

Expiry Date* i

06 / 2014

CCV i

123 [What's this](#)

Comments i

Donation to a worthy cause

Step 2 of 3

Back

Pay Now

i Information:

Your details have been verified, please click Pay Now to finalise the payment

dps | paymentexpress

[Privacy Policy](#)

Receive test confirmation details (Step 3 of 3)

Step 3 of 3

Payment Confirmation Details

Thank you for your payment.

Cardholder Name	Jeff Challis
Total Amount Charged	\$1,000.00
Receipt No.	0000003
Payment Response Desc	The Transaction was approved

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

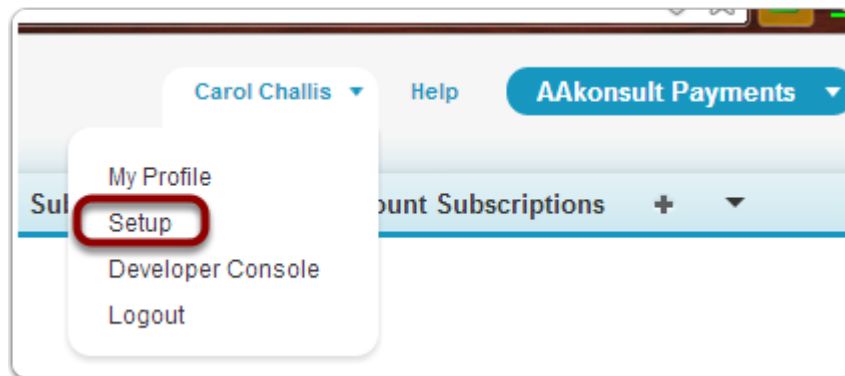
How to enable Force.com Sites

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

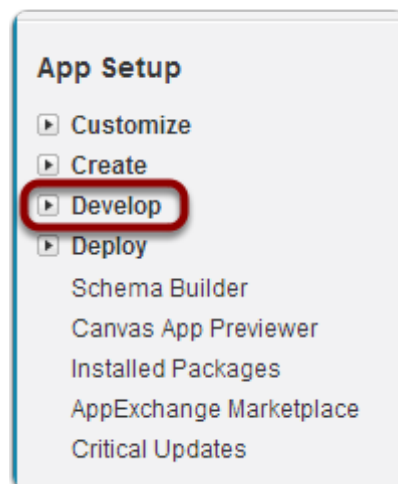
If you haven't already enabled Force.com Sites or are unsure if it's already enabled, this step through will guide your progress.

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

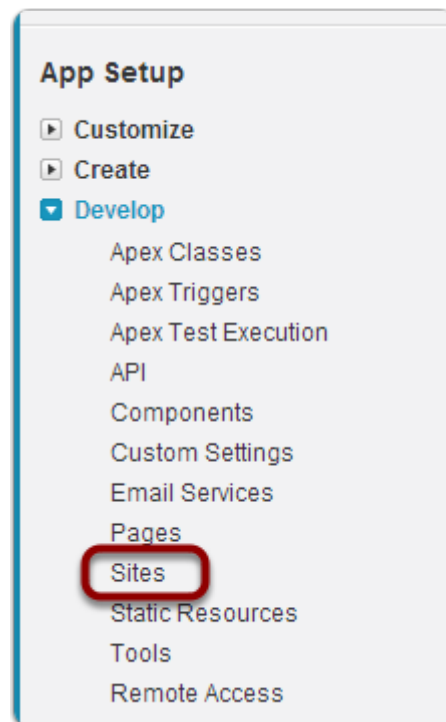
1.1 Select 'Setup' on the RHS of your Salesforce home screen



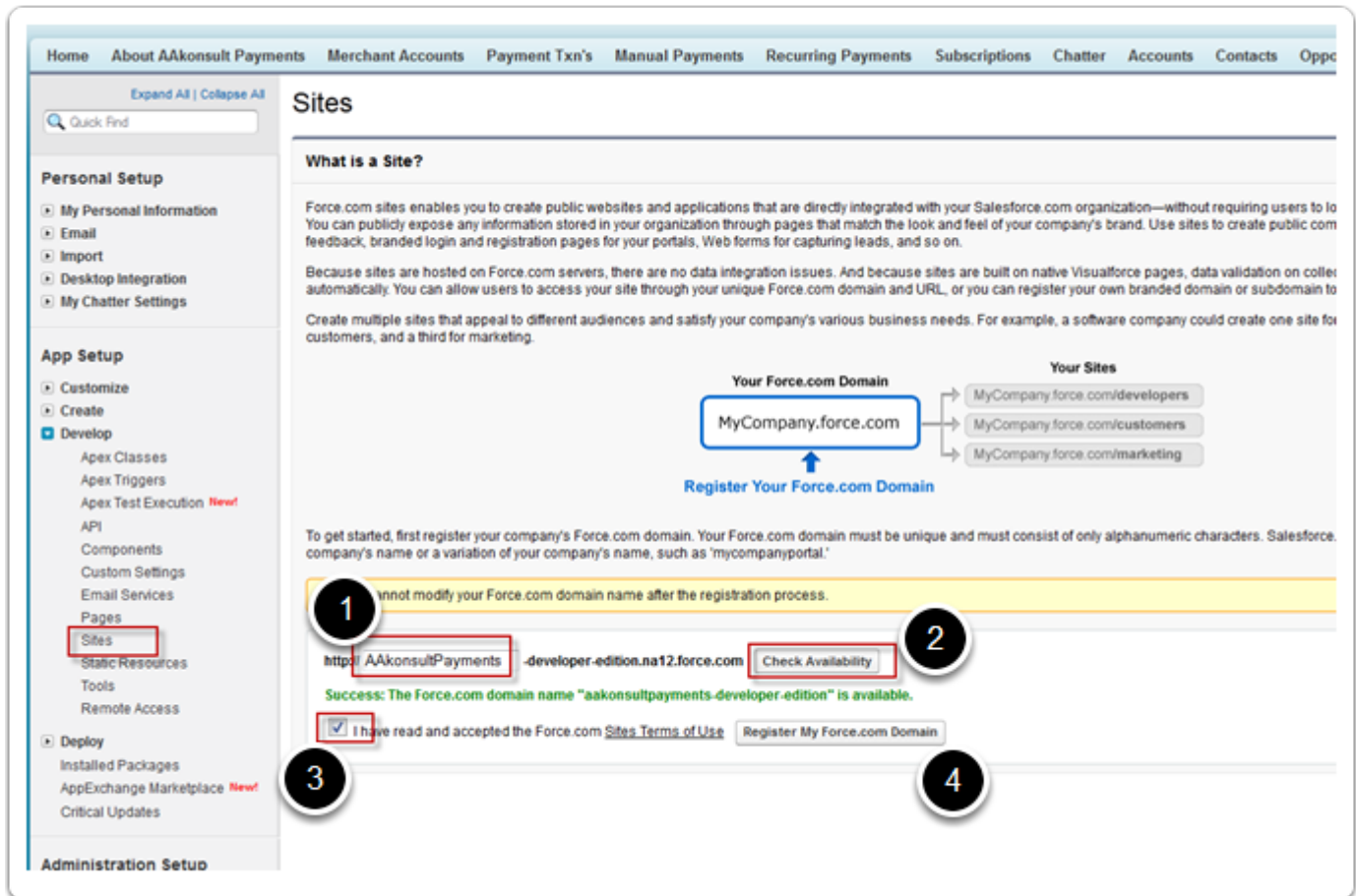
1.2 Select 'Develop' from the App Setup section on the LHS



1.3 Select 'Sites'



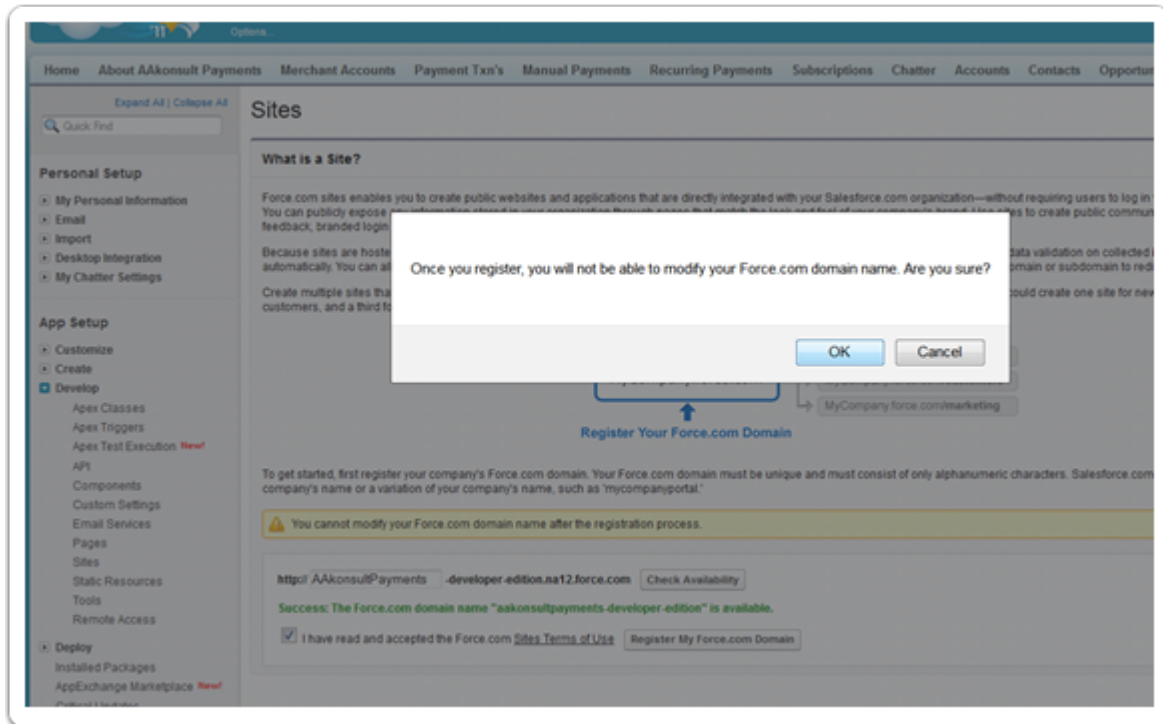
2. Create a Force.com domain name



The screenshot shows the Salesforce 'Sites' setup page. The left sidebar contains navigation menus for 'Personal Setup', 'App Setup', and 'Administration Setup'. The 'Sites' link under 'App Setup' is highlighted. The main content area is titled 'Sites' and includes a 'What is a Site?' section. Below this, a diagram illustrates the relationship between a 'Your Force.com Domain' (MyCompany.force.com) and 'Your Sites' (MyCompany.force.com/developers, MyCompany.force.com/customers, MyCompany.force.com/marketing). A 'Register Your Force.com Domain' button is shown. A yellow warning box states: 'You cannot modify your Force.com domain name after the registration process.' Below this, a text input field contains 'http://AAkonsultPayments-developer-edition.na12.force.com', followed by a 'Check Availability' button. A green success message reads: 'Success: The Force.com domain name "aakonsultpayments-developer-edition" is available.' Below the message is a checkbox labeled 'I have read and accepted the Force.com Sites Terms of Use' and a 'Register My Force.com Domain' button. Four numbered circles (1-4) are overlaid on the page to indicate the steps: 1 points to the domain input field, 2 points to the 'Check Availability' button, 3 points to the 'I have read and accepted the Force.com Sites Terms of Use' checkbox, and 4 points to the 'Register My Force.com Domain' button.

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



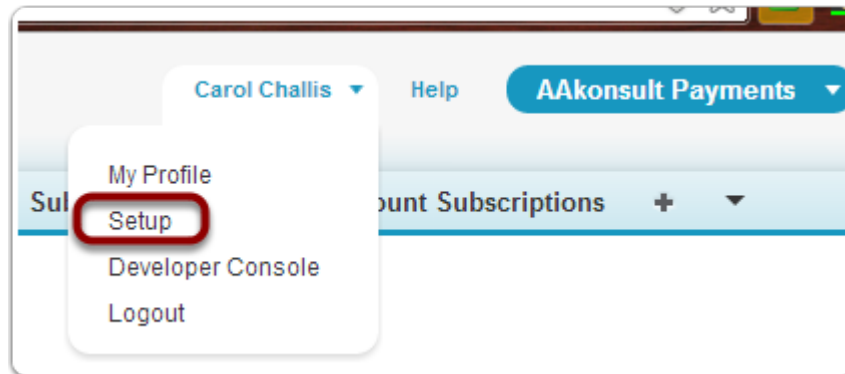
Note: You can only create a domain once so choose its name wisely.

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

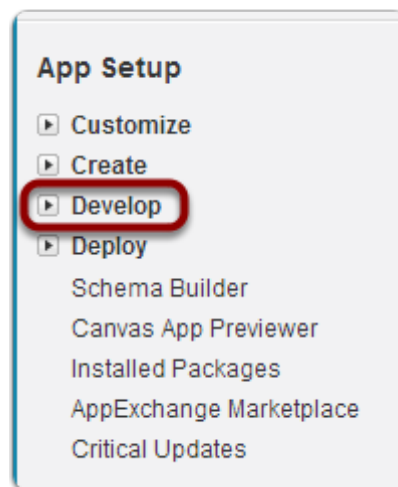
How to create a new Force.com Site

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

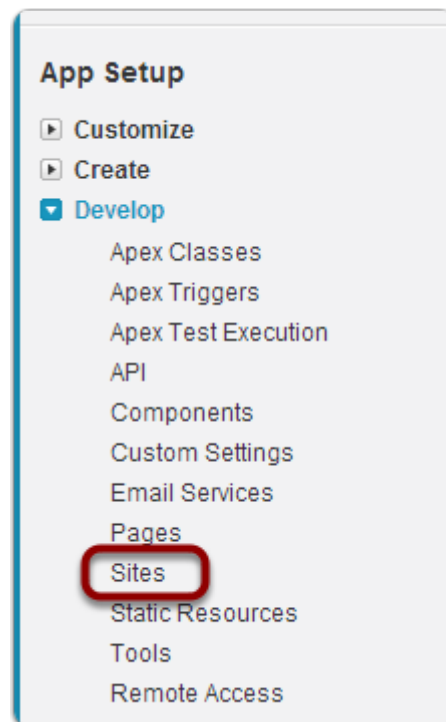
1.1 Select 'Setup' on the RHS of your Salesforce home screen



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 feel to create public community sites to gather customer feedback, branded login and registration pages for your portals, Web forms for capturing information, and more.

Because sites are hosted on Force.com servers, there are no data integration issues. And because sites are built on native Visualforce pages, information is performed automatically. You can allow users to access your site through your unique Force.com domain and URL, or you can use a 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 company can create a site for 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
					m

Installation Manual

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Page 36

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'

Site Edit

New Site

SaveCancel

Site Label	Payment	1
Site Name	Payment	2
Site Description	This is the Force.com site for our special payment page.3	
Site Contact	Carol Challis	
Default Web Address	http://aakpaytest-developer-edition.ap1.force.com/	
Active	<input checked="" type="checkbox"/>	4
Active Site Home Page	checkout	5
Inactive Site Home Page	InMaintenance	[Preview]
Site Template	SiteTemplate	
Site Robots.txt		
Site Favorite Icon		
Analytics Tracking Code		
URL Rewriter Class	URLRewriter	6
Enable Feeds	<input type="checkbox"/>	
Clickjack Protection Level	Allow framing by the same origin only (recommended)	7

8SaveCancel

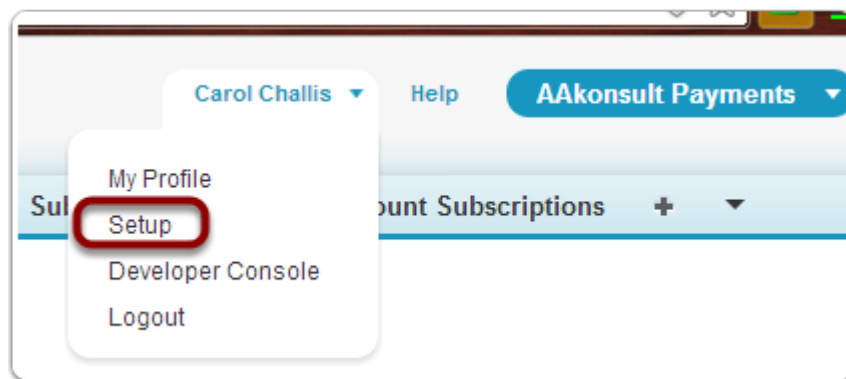
How to set up error checking for Force.com Sites

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

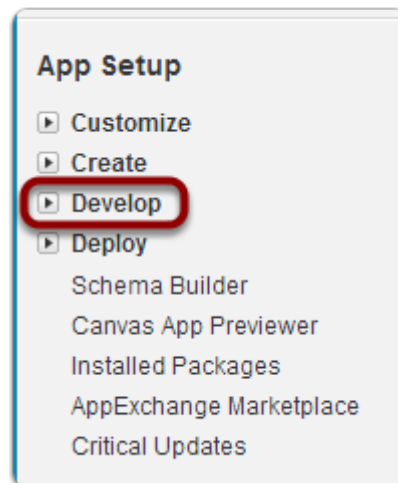
Note: This step should only be carried out if this site is only used for AAkonsult Payments.

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

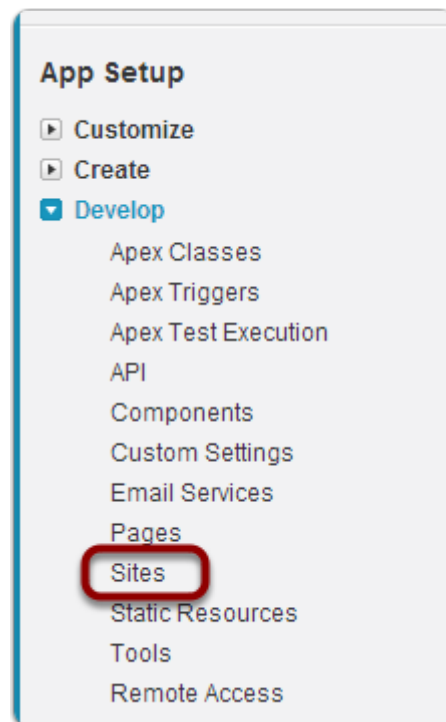
1.1 Select 'Setup' on the RHS of your Salesforce home screen



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



1.3 Select 'Sites'



1.4 Select the Site from the list

Sites


What is a Site?

Force.com sites enables you to create public websites and applications that are directly integrate a username and password. You can publicly expose any information stored in your organization t to create public community sites to gather customer feedback, branded login and registration pag

Because sites are hosted on Force.com servers, there are no data integration issues. And becau information is performed automatically. You can allow users to access your site through your unio or subdomain to redirect to your site.

Create multiple sites that appeal to different audiences and satisfy your company's various busin developers, another for customers, and a third for marketing.

Your Force.com Domain

 MyCompany.force.com

My

My

My

C

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
Edit Deactivate	Payments	http://aakpaytest-developer-edition.ap1.force.com/

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

Site Details
Payments

[« Back to List: Sites](#)

Site Detail [Edit](#) [Public Access Settings](#)

Site Label: Payments

Site Description

Active: ☒

Active Site Home Page: [InMaintenance \[Preview\]](#)

Inactive Site Home Page: [InMaintenance \[Preview\]](#)

Site Template: [SiteTemplate \[Preview\]](#)

Analytics Tracking Code

Clickjack Protection Level: Allow framing by any page (no protection)

Created By: [Jeff Challis](#), 10/05/2013 6:24 PM

[Edit](#) [Public Access Settings](#)

Custom URLs

Action	Domain Name
Edit Del View Preview as Admin	aakpartest-developer-edition.ap1.force.com

Site Visualforce Pages [Edit](#)

Visualforce Page Name	AppEx
BandwidthExceeded	
Exception	
FileNotFound	
ForgotPassword	
ForgotPasswordConfirm	
InMaintenance	

Site Standard Pages [Edit](#)

No standard pages are allowed

Error Pages [Page Assignment](#)

Action	Error Condition	Site Page Name
Preview	Authorization Required Page (401)	Unauthorized
Preview	Limit Exceeded Page (509)	BandwidthExceeded
Preview	Maintenance Page(500/503)	InMaintenance
Preview	Page Not Found Page (404)	FileNotFound
Preview	Generic Error Page	Exception

24-Hour Usage History

Metric	Current Usage
--------	---------------

2.1 Select the 'Page Assignment' button

Error Pages			
		Page Assignment	Error Pages Help ?
Action	Error Condition	Site Page Name	Site Page Description
Preview	Authorization Required Page (401)	Unauthorized	Default Force.com Authorization Required page
Preview	Limit Exceeded Page (509)	BandwidthExceeded	Default Force.com Limit Exceeded page
Preview	Maintenance Page(500/503)	InMaintenance	Default Force.com In Maintenance page
Preview	Page Not Found Page (404)	FileNotFound	Default Force.com Page/Data Not Found page
Preview	Generic Error Page	Exception	Default Force.com page for post-authentication errors

2.2 Type 'checkoutError' for the two fields shown below

Assign Error Pages

Payments

By default, standard Force.com-branded error pages appear. Replace them with yo

Assign Error Pages

Save Cancel

Authorization Required Page (401)

Unauthorized

Limit Exceeded Page (509)

BandwidthExceeded

Maintenance Page(500/503)

InMaintenance

Page Not Found Page (404)

CheckoutError

Generic Error Page

CheckoutError

Save Cancel

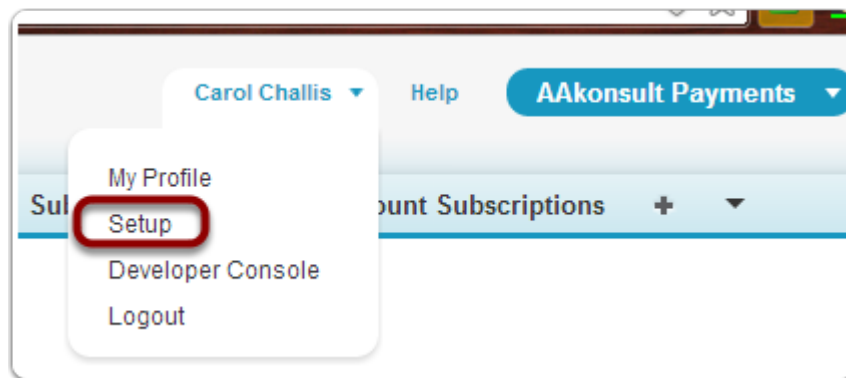
2.3 Select 'Save'

How to test your site

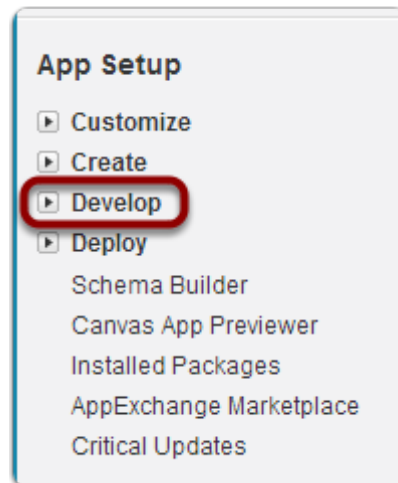
Enough details have now been setup to enable your site to run in a test mode. You won't be able to do make transactions until you have completed the Merchant Account facility.

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

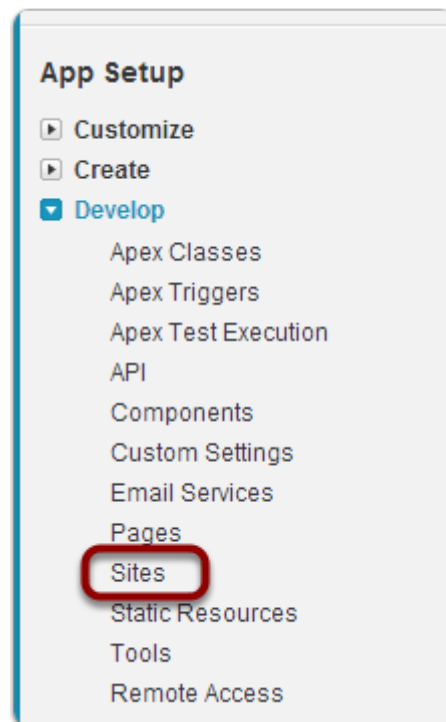
1.1 Select 'Setup' on the RHS of your Salesforce home screen



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**

Sites

What is a Site?

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Your Force.com Domain

✓ MyCompany.force.com

My
My
My
C

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
Edit Deactivate	Payments	<div>http://aakpaytest-developer-edition.ap1.force.com/</div>

Installation Manual

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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 - 360000000000008

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	<input type="text" value="--None--"/>
First Name*	<input type="text"/>
Last Name*	<input type="text"/>
Phone*	<input type="text"/>
Mobile Phone	<input type="text"/>
Email*	<input type="text"/>
Street*	<input type="text"/>

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.

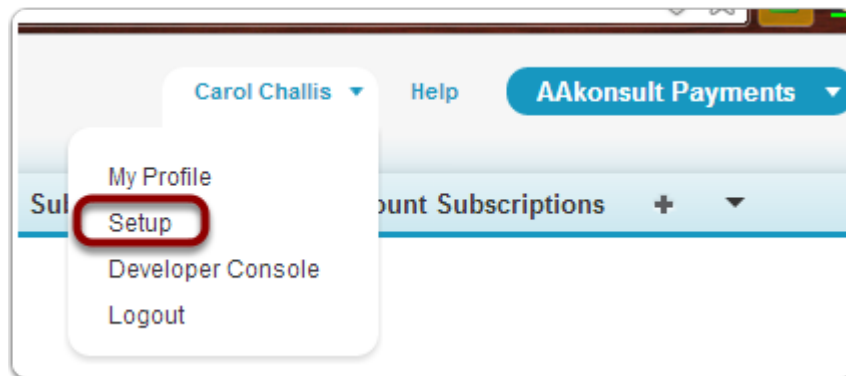
How to connect your new site to your Merchant Facility

To obtain an eCommerce Merchant Facility, follow '[How to set up a Merchant Facility](#)'.

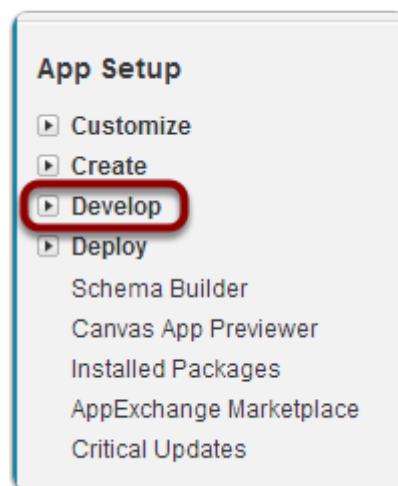
NOTE: This may take a few weeks.

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

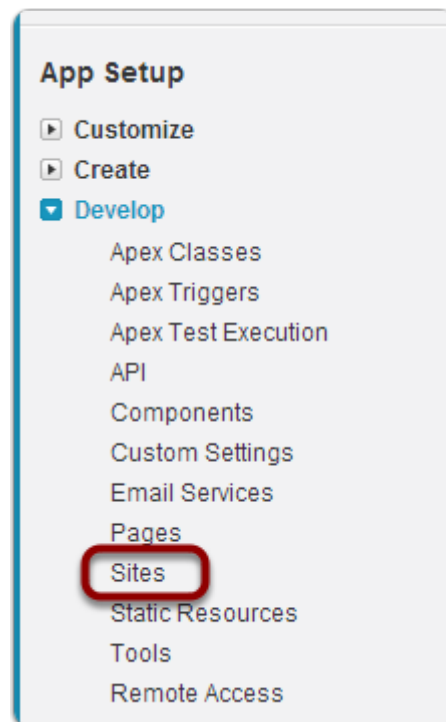
1.1 Select 'Setup' on the RHS of your Salesforce home screen



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 https//

Sites

What is a Site?

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Create multiple sites that appeal to different audiences and satisfy your company's various business developers, another for customers, and a third for marketing.

Your Force.com Domain

✓ MyCompany.force.com

My
My
My
C

Your Force.com domain name is **aakpaytest-developer-edition.ap1.force.com**

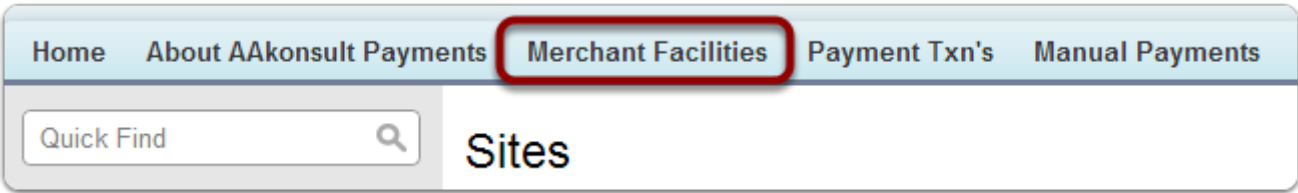
Force.com Sites [Terms and Conditions](#)

Sites (aakpaytest-developer-edition.ap1.force.com)

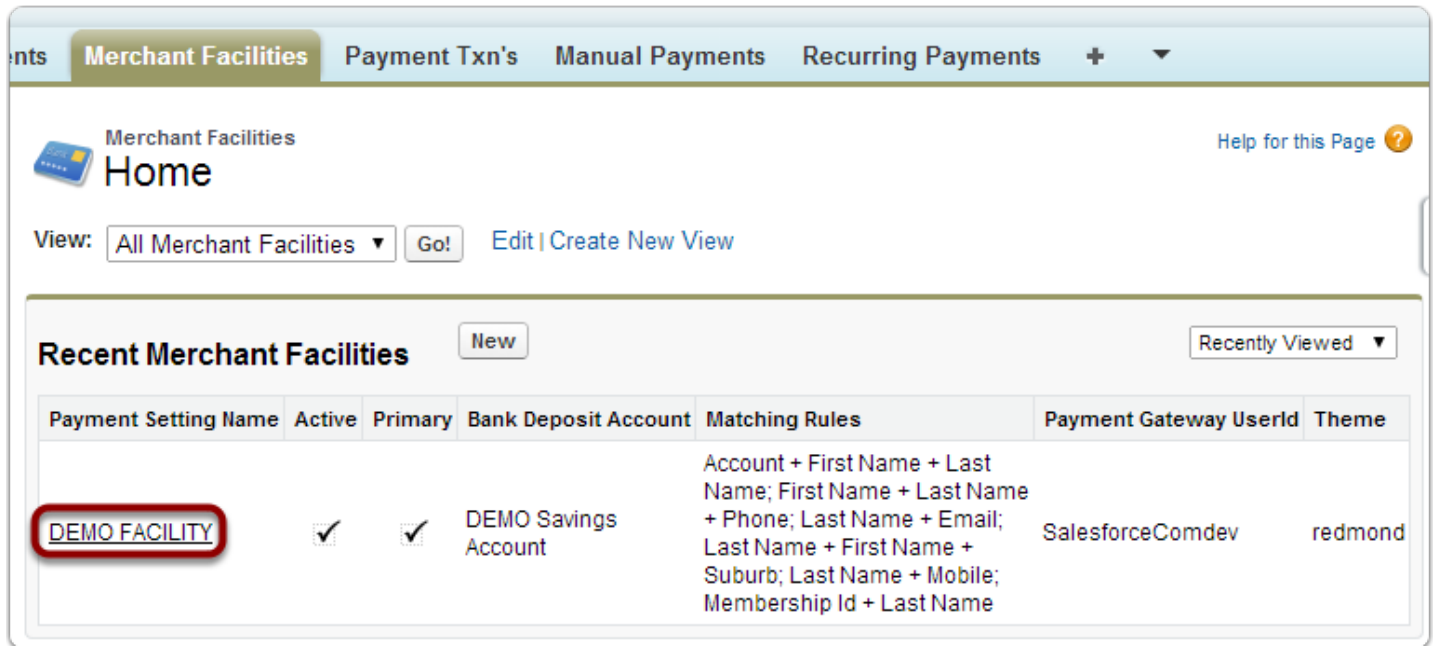
New

Action	Site Label ↑	Site URL
Edit Deactivate	Payments	http://aakpaytest-developer-edition.ap1.force.com/

3. Navigate to the 'Merchant Facilities' tab



4. Select the Merchant Facility you wish to use



Merchant Facilities Home [Help for this Page ?](#)

View: All Merchant Facilities Go! [Edit](#) | [Create New View](#)

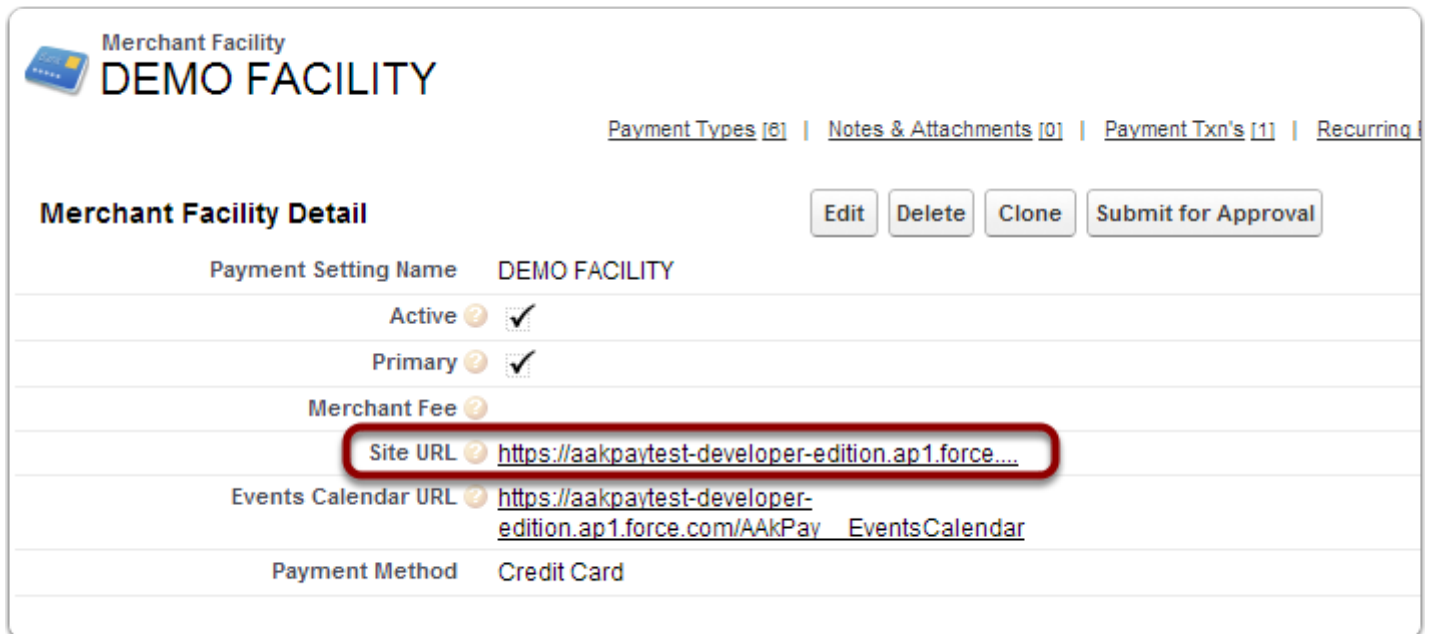
Recent Merchant Facilities New Recently Viewed

Payment Setting Name	Active	Primary	Bank Deposit Account	Matching Rules	Payment Gateway UserId	Theme
DEMO FACILITY	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	DEMO Savings Account	Account + First Name + Last Name; First Name + Last Name + Phone; Last Name + Email; Last Name + First Name + Suburb; Last Name + Mobile; Membership Id + Last Name	SalesforceComdev	redmond

5. Select 'Edit'

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

Paste shortcut - Ctrl V



Merchant Facility **DEMO FACILITY**

[Payment Types \[0\]](#) | [Notes & Attachments \[0\]](#) | [Payment Txn's \[1\]](#) | [Recurring](#)

Merchant Facility Detail Edit Delete Clone Submit for Approval

Payment Setting Name DEMO FACILITY

Active ☒

Primary ☒

Merchant Fee

Site URL

Events Calendar URL

Payment Method Credit Card

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 be 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.

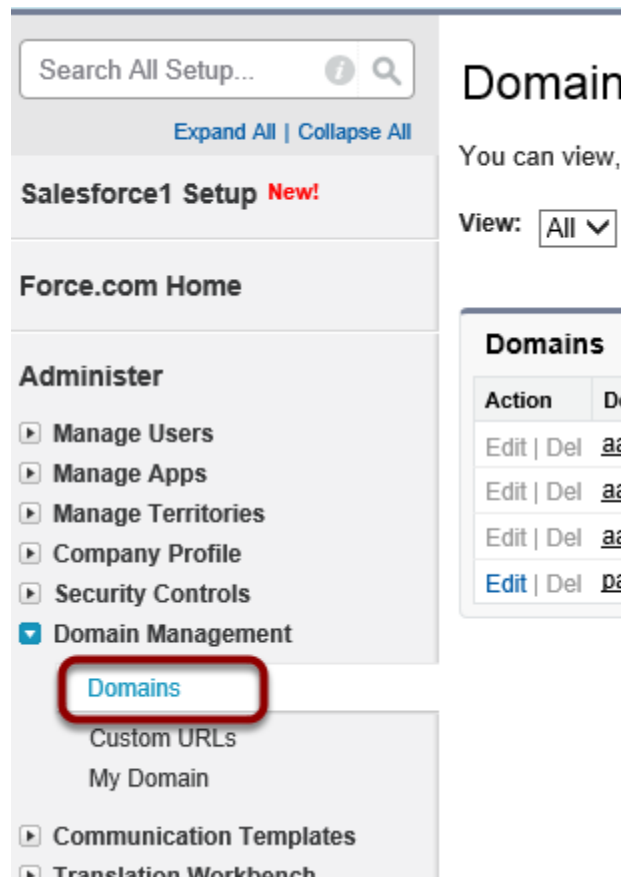
An example of a custom URL is pay.aakonsultpayments.com (vs. the default of <https://aakonsultpayments.secure.force.com>).

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

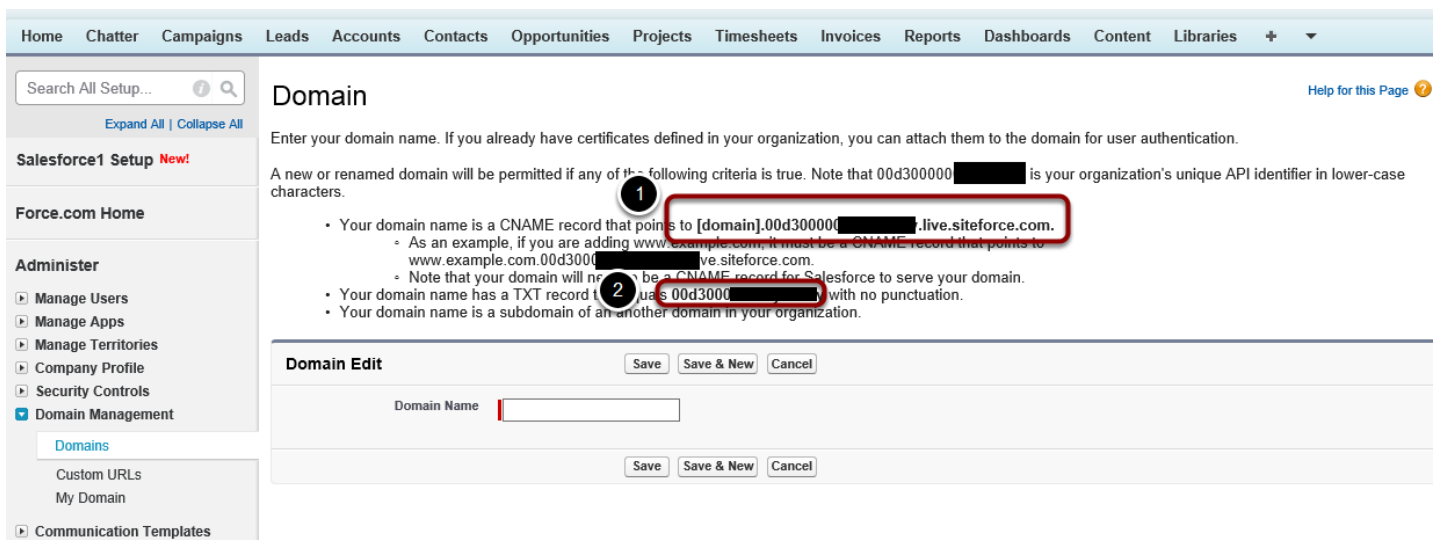
Quick Steps:

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

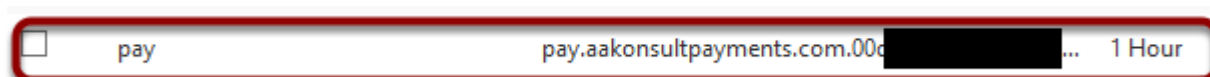


Please note and read the instructions as detailed here. You will need to copy these details and use them in the next step. Keep this screen in Salesforce open as you will need to come back to here in step 3.

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



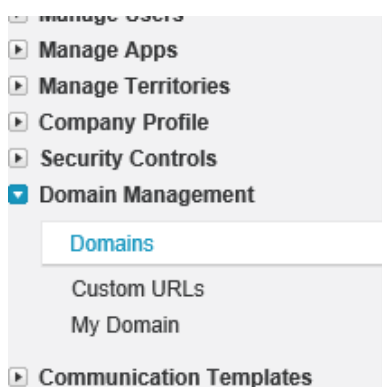
For our example domain, we are choosing to use pay.aakonsultpayments.com. We have copied the sample given in step 2, point (1) and replaced [domain] with the one we wish to use.

3.2 Add text record

TXT (Text) ⓘ				
3 Records (0 Selected)				
✓	Host	TXT Value	TTL	Actions
<input type="checkbox"/>	@	goog [REDACTED]	1 Hour	 
<input type="checkbox"/>	salesforceid	00d300 [REDACTED]	1 Hour	 

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

4. Add the domain to Salesforce



• Your domain name is a subdomain of another domain in your organization.

Domain Edit
Save Save & New Cancel

Domain Name

Save Save & New Cancel

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 may take up to 24 hours before they become available.

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

The screenshot shows the Salesforce1 Setup interface. On the left is a sidebar with a search bar and a navigation menu. The main content area is titled 'Custom URL' and contains a 'Custom URL Edit' form. The form has two input fields: 'Domain' and 'Site'. The 'Domain' field contains 'pay.aakonsultpayments.c' and the 'Site' field contains 'payments'. Both fields are highlighted with red boxes and numbered 1 and 2 respectively. The 'Path' field is empty. The form has 'Save', 'Save & New', and 'Cancel' buttons at the top and bottom.

Custom URL

Once you select your domain and site relationship, add a unique path to create a custom URL. The same path value may be used on more than one used more than once within the same domain.

Custom URL Edit

1 Domain 2 Site Path

Save Save & New Cancel

Link the domain created in step 4 to the Site that was created when setting up [Force.com sites](#).

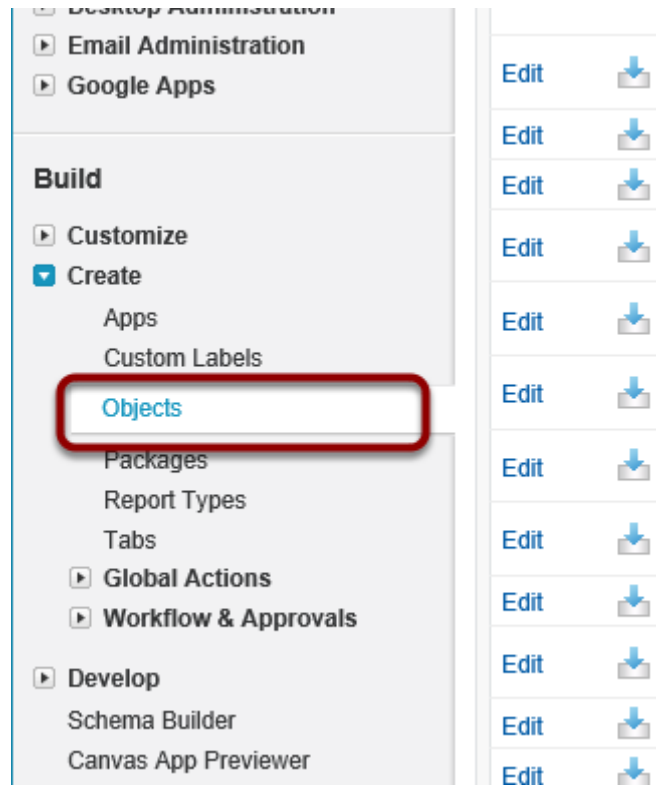
Your new URL is now ready to use.

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

Package Information

Installed Package AAkPayments

Available in Versions 1.12 - Current






Standard Fields

Action	Field Label	Field Name	Data Type	Contr
	<u>Created By</u>	CreatedBy	Lookup(User)	
	<u>Last Modified By</u>	LastModifiedBy	Lookup(User)	
Edit	<u>Owner</u>	Owner	Lookup(User,Queue)	
	<u>URL parameter Name</u>	Name	Auto Number	

Custom Fields & Relationships

[New](#) [Field Dependencies](#)

[Custom](#)

Action	Field Label	API Name	Installed Package	Data Type	Controlling Field
Edit	 <u>Account</u>	AAkPay__Account__c	<u>AAkPayments</u>	Lookup(Account)	
Edit	 <u>Account Subscription</u>	AAkPay__Account_Subscription__c	<u>AAkPayments</u>	Lookup(Account Subscription)	
Edit	 <u>Amount</u>	AAkPay__Amount__c	<u>AAkPayments</u>	Currency(7, 2)	
Edit	 <u>Campaign</u>	AAkPay__Campaign__c	<u>AAkPayments</u>	Lookup(Campaign)	
Edit	 <u>City</u>	AAkPay__MailingCity__c	<u>AAkPayments</u>	Text(40)	

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

6.3 Select Type formula

URL Token

[Help for this Page](#) 

New Custom Field

Step 1. Choose the field type

Step 1

2

[Next](#) [Cancel](#)

Specify the type of information that the custom field will contain.

Data Type

☐ None Selected

Select one of the data types below.

☐ Auto Number

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

☒ Formula **1**

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

☐ Roll-Up Summary 

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

☐ Lookup Relationship

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

6.4 Add name and select type text

URL Token

New Custom Field

[Help for this Page](#)

Step 2. Choose output type Step 2 of 5

Previous **Next** Cancel

1 **Field Label** **Field Name**

Formula Return Type

☐ None Selected Select one of the data types below.

☐ Checkbox Calculate a boolean value
Example: `TODAY() > CloseDate`

☐ Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `Gross Margin = Amount - Cost_c`

☐ Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: `Reminder Date = CloseDate - 7`

☐ Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: `Next = NOW() + 1`

☐ Number Calculate a numeric value.
Example: `Fahrenheit = 1.8 * Celsius_c + 32`

☐ Percent Calculate a percent and automatically add the percent sign to the number.
Example: `Discount = (Amount - Discounted_Amount_c) / Amount`

☒ **Text** 2 Create a text string, for example, by concatenating other text fields
Example: `Full Name = LastName & ", " & FirstName`

6.5 Add formula

URL Token

New Custom Field

[Help for this Page](#)

Step 3. Enter formula Step 3 of 5

Previous Next Cancel

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: `Full Name = LastName & ", " & FirstName` [More Examples ...](#)

Simple Formula **Advanced Formula**

Insert Field **Insert Operator**

Tiny URL (Text) =

`"https://pay.mydomain.com/U/" & AAKPay_Tiny_Token_c`

Functions

-- All Function Categories --

ABS
AND
BEGINS
BLANKVALUE
BR
CASE

Insert Selected Function

Quick Tips

- [Getting Started](#)
- [Operators & Functions](#)

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.

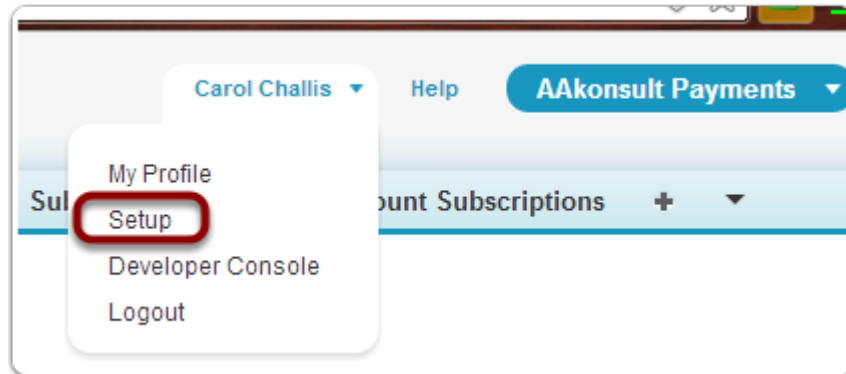
Security

How to set up external site security (older version)

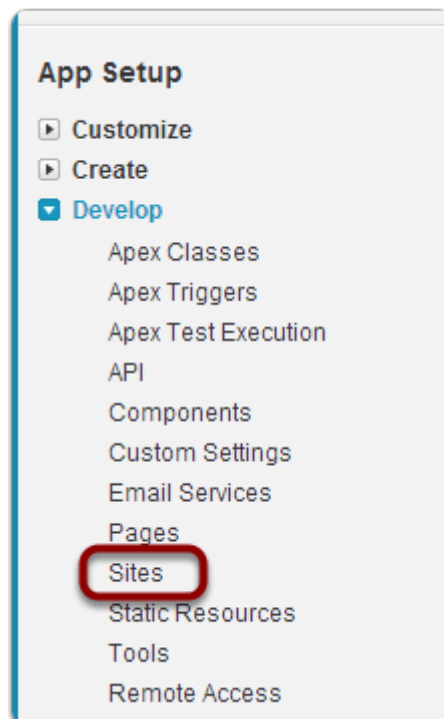
How you set up security will depend on the needs of your organisation.

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

Sites

What is a Site?

Force.com sites enables you to create public websites and applications that are directly integrate a username and password. You can publicly expose any information stored in your organization t to create public community sites to gather customer feedback, branded login and registration pag

Because sites are hosted on Force.com servers, there are no data integration issues. And becau information is performed automatically. You can allow users to access your site through your unio or subdomain to redirect to your site.

Create multiple sites that appeal to different audiences and satisfy your company's various busin developers, another for customers, and a third for marketing.

Your Force.com Domain

✓ MyCompany.force.com

My

My

My

C

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
Edit Deactivate	Payments	http://aakpaytest-developer-edition.ap1.force.com/

Installation Manual

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2. Select the 'Public Access Settings' button

Site Details
Payments

[« Back to List: Sites](#)

Site Detail

Edit
Public Access Settings
Login Settings
URL Redirects
Deactivate

Site Label	Payments	Site Name	Payments
Site Description		Site Contact	Jeff Challis
Active	<input checked="" type="checkbox"/>	Login	Not Allowed
Active Site Home Page	InMaintenance [Preview]	Site Favorite Icon	
Inactive Site Home Page	InMaintenance [Preview]	Site Robots.txt	
Site Template	SiteTemplate [Preview]	Enable Feeds	<input type="checkbox"/>
Analytics Tracking Code		URL Rewriter Class	
Clickjack Protection Level	Allow framing by any page (no protection)		
Created By	Jeff Challis , 10/05/2013 6:24 PM		Last Modified By Jeff Challis , 3/10/2013 5:49 PM

Edit
Public Access Settings
Login Settings
URL Redirects
Deactivate

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.

Profile

Payments Profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[0\]](#) | [Enabled Visualforce Page Access \[11\]](#)

Profile Detail

Edit

View Users

Name	Payments Profile		
User License	Guest	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	Jeff Challis , 10/05/2013 6:24 PM	Modified By	Jeff Challis , 3/10/2013 6:01 PM

Page Layouts

Standard Object Layouts

Home Page Layout	Home Page Default [View Assignment]	Idea	Varies by Record Type [View Assignment]
Account	Account Layout [View Assignment]	Lead	Lead Layout [View Assignment]
Asset	Asset Layout [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
Campaign	Campaign Layout [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]
Campaign Member	Campaign Member Page Layout [View Assignment]	Price Book	Price Book Layout [View Assignment]
Case	Case Layout [View Assignment]	Product	Product Layout [View Assignment]
Case Close	Close Case Layout [View Assignment]	Solution	Solution Layout [View Assignment]
Contact	Contact Layout	Task	Task Layout

4. Set 'Record Types'.

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4.1 Scroll down to 'Record Type Settings' heading

Record Type Settings			
Standard Record Type Settings			
Accounts		Events	
Announcements		Inbound Social Posts	
Campaigns		Leads	
Campaign Members		Opportunities	
Cases		Price Books	
Contacts		Products	
Content		Solutions	
Contracts		Tasks	
Custom Record Type Settings			
Account Subscriptions		Payment Options	Event, Subs [Edit]
Account Subscription Payment		Payment Txn's	Direct Debit, [Edit]
Direct Debit Batches		Payment Types	
Error Logs		Recurring Payments	Credit Card [Edit]
Import Files		Subscription Groups	
Import File Line Items		Subscriptions	
Import File Line Item Payment Txn's		Subscription Issues	
Merchant Facilities	Payment (Default) [Edit]	Subscription Issue Items	

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

Record Type Settings			
Standard Record Type Settings			
Accounts			Events
Announcements			Inbound Social Posts
Campaigns			Leads
Campaign Members			Opportunities
Cases			Price Books
Contacts			Products
Content			Solutions
Contracts			Tasks
Custom Record Type Settings			
Account Subscriptions		Payment Options	Event, Subscrip [Edit]
Account Subscription Payment		Payment Txn's	Direct Debit [Edit]
Direct Debit Batches		Payment Types	
Error Logs		Recurring Payments	Credit Card [Edit]
Import Files		Subscription Groups	
Import File Line Items		Subscriptions	
Import File Line Item Payment Txn's		Subscription Issues	
Merchant Facilities	Payment (Default) [Edit]		Subscription Issue Items

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

Edit Record Type Settings

Payment Txn

Record Type Settings Edit

Save

Cancel

User Profile

Payments Profile

Record Type

Payment Txn

Selected Record Types

Select the record types for this user profile. You need to add the record type field to the page layout associated with this profile to display it on record detail and edit pages.

Available Record Types

--Master--

Auth

Payment

Refund

Add

Remove

Selected Record Types

Direct Debit

Events

Manual

Shopping Cart

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

The screenshot displays a configuration window for user profiles. It is divided into two main sections: 'Selected Record Types' and 'Default Record Type'.

Selected Record Types Section:

- Available Record Types:** A list box containing '--Master--'.
- Selected Record Types:** A list box containing 'Auth', 'Direct Debit', 'Events', 'Manual', 'Payment', 'Refund', and 'Shopping Cart'.
- Buttons:** 'Add' (with a right arrow) and 'Remove' (with a left arrow) are positioned between the two list boxes.

Default Record Type Section:

- Text:** 'Select the default record type for this user profile. The default record type is used v'.
- Form:** A dropdown menu with 'Manual' selected. The word 'Default' is to the left of the dropdown. A red box highlights the dropdown, and a black circle with the number '1' is next to it.
- Buttons:** 'Save' and 'Cancel' are at the bottom right. A red box highlights the 'Save' button, and a black circle with the number '2' is next to it.

5. Allocate Permissions.

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

Standard Object Permissions						
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
Assets	<input type="checkbox"/>	<input type="checkbox"/>				
Campaigns	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
Cases	<input type="checkbox"/>	<input type="checkbox"/>				
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
Contracts	<input type="checkbox"/>	<input type="checkbox"/>				
Documents	<input type="checkbox"/>	<input type="checkbox"/>				

Custom Object Permissions						
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Account Subscriptions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Account Subscription Payment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Direct Debit Batches	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Error Logs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Import Files	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Import File Line Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Import File Line Item Payment Txn's	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Merchant Facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Payment Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Payment Item Group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Standard Object Permissions						
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Ideas	<input checked="" type="checkbox"/>					
Leads	<input type="checkbox"/>	<input type="checkbox"/>				
Opportunities	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
Price Books	<input type="checkbox"/>					
Products	<input type="checkbox"/>					
Solutions	<input type="checkbox"/>	<input type="checkbox"/>				

Custom Object Permissions						
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Payment Options	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Payment Txn's	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Payment Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recurring Payments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Subscription Groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Subscriptions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Subscription Issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Subscription Issue Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Subscription Payments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
URL Tokens	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Accounts
<input type="checkbox"/>	<input type="checkbox"/>					Assets
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Campaigns
<input type="checkbox"/>	<input type="checkbox"/>					Cases
<input type="checkbox"/>	<input type="checkbox"/>					Coaching
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Contacts
<input type="checkbox"/>	<input type="checkbox"/>					Contracts
<input type="checkbox"/>	<input type="checkbox"/>					Documents
<input type="checkbox"/>	<input type="checkbox"/>					Feedback
<input type="checkbox"/>	<input type="checkbox"/>					Feedback Questions
<input type="checkbox"/>	<input type="checkbox"/>					Feedback Question Sets
<input type="checkbox"/>	<input type="checkbox"/>					Feedback Requests

Basic Access					Data Administration	
Read	Create	Edit	Delete	View All	Modify All	
<input type="checkbox"/>	<input type="checkbox"/>					Goals
<input type="checkbox"/>	<input type="checkbox"/>					Goal Collaborators
<input type="checkbox"/>	<input type="checkbox"/>					Goal Links
<input type="checkbox"/>						Ideas
<input type="checkbox"/>	<input type="checkbox"/>					Leads
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Opportunities
<input type="checkbox"/>	<input type="checkbox"/>					Orders
<input type="checkbox"/>	<input type="checkbox"/>					Performance Cycles
<input checked="" type="checkbox"/>						Price Books
<input checked="" type="checkbox"/>						Products
<input type="checkbox"/>	<input type="checkbox"/>					Solutions

Basic Access					Data Administration	
Read	Create	Edit	Delete	View All	Modify All	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Account Subscriptions
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Account Subscription Payment
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Direct Debit Batches
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Error Logs
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Import Files
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Import File Line Items
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Import File Line Item Payment Txn's
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Merchant Facilities
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Payment Forms
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Payment Items
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Payment Item Group

Basic Access					Data Administration	
Read	Create	Edit	Delete	View All	Modify All	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Payment Options
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Payment Txn's
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Recurring Payments
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Recurring Payment Txn's
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Subscription Groups
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Subscriptions
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Subscription Issues
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Subscription Issue Items
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Subscription Payments
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	URL Tokens

5.4 Select 'Save'.

6. Assign users.

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

Profile

Payments Profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) |
 [Enabled Apex Class Access \[0\]](#) |
 [Enabled Visualforce Page Access \[11\]](#)

Profile Detail

Edit

View Users

Name	Payments Profile
User License	Guest
Custom Profile	<input checked="" type="checkbox"/>

6.2 Select user to be assigned AAkonsult Payments access.

Payments Profile

A B C D E			
Action	Full Name ↑	Alias	Username
Edit	Site Guest User, Payments	guest	payments@aakpaytest-developer-edition.ap1.force.com
A B C D E			

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.

User

Payments Site Guest User

[Permission Set Assignments \(0\)](#) |
 [Permission Set License Assignments \(0\)](#) |
 [Public Group Membership \(0\)](#) |
 [Queue Membership \(0\)](#)

User Detail

Name

Payments Site Guest User

Alias

guest

Email

[jeff.challis@aakonsult.com](#)

Username

payments@aakpaytest-developer-edition.ap1.force.com

Nickname

Payments [i](#)

Division

Time Zone

(GMT+00:00) Greenwich Mean Time (GMT)

Locale

English (Australia)

Language

English

Time-Based Token

[i](#)

Created By

[Jeff Challis](#), 10/05/2013 6:24 PM

User License

Guest

Profile

[Payments Profile](#)

Active

☒

Mobile Push Registrations

[View](#)

Salesforce CRM Content User

☐

Email Encoding

General US & Western Europe (ISO-

Used Data Space

0 B [View](#)

Used File Space

0 B [View](#)

Modified By

[Jeff Challis](#), 10/05/2013 6:29 PM

6.4 Select 'Edit Assignments'

User

Payments Site Guest User

Permission Set Assignments [0] | Permission Set License Assignm

User Detail

Edit

Name	Payments Site Guest User
Alias	guest
Email	jeff.challis@aakonsult.com
Username	payments@aakpaytest-developer-edition.ap1.force.com
Nickname	Payments i
Division	
Time Zone	(GMT+00:00) Greenwich Mean Time (GMT)
Locale	English (Australia)
Language	English
Time-Based Token	i
Created By	Jeff Challis , 10/05/2013 6:24 PM

Edit

Permission Set Assignments

Edit Assignments

No records to display

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

Permission Set Assignments
Payments Site Guest User

Save Cancel

Available Permission Sets		Enabled Permission Sets
AAkonsult Payments Sites	<div>Add ▶</div> <div>◀ Remove</div>	

Save Cancel

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.

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]	

7.3 Check that the individual fields relevant to you are visible

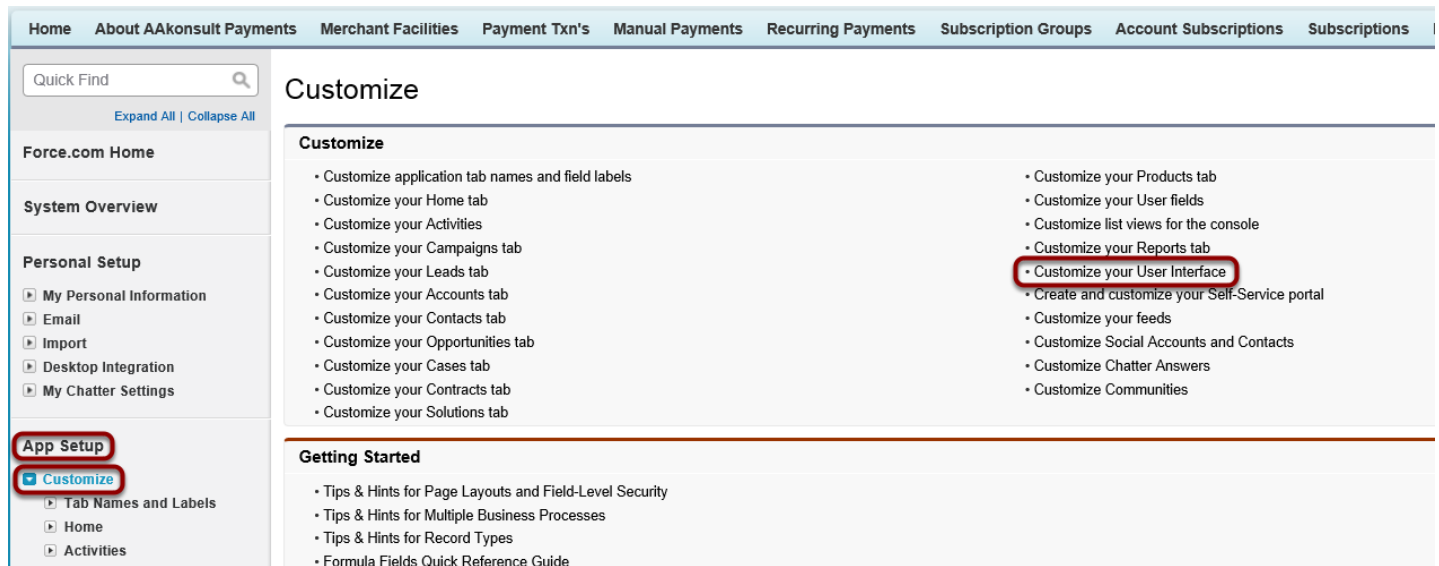
As a minimum, Name, Address and Amount fields should be ticked at 'Visible'.

Account Field-Level Security for profile			
Payments Profile			
Edit Back to Profile			
Field Name	Field Type	Visible	Read-Only
Account Name	Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Account Number	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Account Owner	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Account Search Name	Text	<input type="checkbox"/>	<input type="checkbox"/>
Account Site	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Account Source	Picklist	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Active	Picklist	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Annual Revenue	Currency	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Billing Address	Address	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Created By	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Create URL Token	Checkbox	<input type="checkbox"/>	<input type="checkbox"/>

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'



The screenshot shows the Salesforce Setup interface. The top navigation bar includes links: Home, About AAkonsult Payments, Merchant Facilities, Payment Txn's, Manual Payments, Recurring Payments, Subscription Groups, Account Subscriptions, and Subscriptions. On the left sidebar, the 'App Setup' link is highlighted with a red box, and the 'Customize' link under it is also highlighted with a red box. The main content area is titled 'Customize' and contains two sections: 'Customize' and 'Getting Started'. The 'Customize' section lists various customization options, with 'Customize your User Interface' highlighted by a red box. The 'Getting Started' section lists tips and hints for page layouts, business processes, record types, and formula fields.

Customize

- Customize application tab names and field labels
- Customize your Home tab
- Customize your Activities
- Customize your Campaigns tab
- Customize your Leads tab
- Customize your Accounts tab
- Customize your Contacts tab
- Customize your Opportunities tab
- Customize your Cases tab
- Customize your Contracts tab
- Customize your Solutions tab
- Customize your Products tab
- Customize your User fields
- Customize list views for the console
- Customize your Reports tab
- **Customize your User Interface**
- Create and customize your Self-Service portal
- Customize your feeds
- Customize Social Accounts and Contacts
- Customize Chatter Answers
- Customize Communities


Getting Started

- Tips & Hints for Page Layouts and Field-Level Security
- Tips & Hints for Multiple Business Processes
- Tips & Hints for Record Types
- Formula Fields Quick Reference Guide

8.2 Tick the boxes shown below and 'Save'

User Interface

Modify your organization's user interface with the following settings:

User Interface
<input checked="" type="checkbox"/> Enable Collapsible Sections
<input checked="" type="checkbox"/> Show Quick Create
<input checked="" type="checkbox"/> Enable Hover Details
<input checked="" type="checkbox"/> Enable Related List Hover Links
<input type="checkbox"/> Enable Separate Loading of Related Lists
<input checked="" type="checkbox"/> Enable Inline Editing
<input checked="" type="checkbox"/> Enable Enhanced Lists
<input checked="" type="checkbox"/> Enable New User Interface Theme
<input checked="" type="checkbox"/> Enable Tab Bar Organizer
<input checked="" type="checkbox"/> Enable Printable List Views
<input checked="" type="checkbox"/> Enable Spell Checker
<input type="checkbox"/> Enable Spell Checker on Tasks and Events
<input checked="" type="checkbox"/> Enable Customization of Chatter User Profile Pages 
Sidebar
<input type="checkbox"/> Enable Collapsible Sidebar
<input type="checkbox"/> Show Custom Sidebar Components on All Pages

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'

The screenshot shows the Salesforce Setup interface. The top navigation bar includes links: Home, About AAkonsult Payments, Merchant Facilities, Payment Txn's, Manual Payments, Recurring Payments, Subscription Groups, Account Subscriptions, and Subscriptions. Below this is a 'Quick Find' search bar and 'Expand All | Collapse All' links. The left sidebar contains the following sections:

- Force.com Home
- System Overview
- Personal Setup
 - My Personal Information
 - Email
 - Import
 - Desktop Integration
 - My Chatter Settings
- App Setup** (marked with a red circle and a '1')
 - Customize** (marked with a red circle and a '2')
 - Tab Names and Labels
 - Home
 - Activities

The main content area is titled 'Customize' and contains two columns of links:

- Customize**
 - Customize application tab names and field labels
 - Customize your Home tab
 - Customize your Activities
 - Customize your Campaigns tab
 - Customize your Leads tab
 - Customize your Accounts tab
 - Customize your Contacts tab
 - Customize your Opportunities tab
 - Customize your Cases tab
 - Customize your Contracts tab
 - Customize your Solutions tab
 - Customize your Products tab
 - Customize your User fields
 - Customize list views for the console
 - Customize your Reports tab
 - Customize your User Interface** (marked with a red circle and a '2')
 - Create and customize your Self-Service portal
 - Customize your feeds
 - Customize Social Accounts and Contacts
 - Customize Chatter Answers
 - Customize Communities
- Getting Started**
 - Tips & Hints for Page Layouts and Field-Level Security
 - Tips & Hints for Multiple Business Processes
 - Tips & Hints for Record Types
 - Formula Fields Quick Reference Guide

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.


User Interface

Modify your organization's user interface with the following settings:

User Interface

- ☒ Enable Collapsible Sections
- ☒ Show Quick Create
- ☒ Enable Hover Details
- ☒ Enable Related List Hover Links
- ☐ Enable Separate Loading of Related Lists
- ☒ Enable Inline Editing
- ☐ Enable Enhanced Lists
- ☐ Enable New User Interface Theme

 Some Salesforce features like Chatter need the new user interface theme. Disabling the theme disables Chatter.

- ☒ Enable Tab Bar Organizer
- ☒ Enable Printable List Views
- ☒ Enable Spell Checker
 - ☐ Enable Spell Checker on Tasks and Events
- ☒ Enable Customization of Chatter User Profile Pages 

Sidebar

- ☐ Enable Collapsible Sidebar
- ☐ Show Custom Sidebar Components on All Pages

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

Show Custom Sidebar On All Pages ☐

Standard Object Permissions

The permissions defined here control access at the object level. Access to individual records within that object type is controlled by the sharing model. Set access levels based on the functional requirements for the profile. For example, create different groups of permissions for individual contributors, managers, and administrators. [How do I choose?](#)

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Assets	<input type="checkbox"/>	<input type="checkbox"/>				
Campaigns	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
Cases	<input type="checkbox"/>	<input type="checkbox"/>				
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
Contracts	<input type="checkbox"/>	<input type="checkbox"/>				
Documents	<input type="checkbox"/>	<input type="checkbox"/>				
Ideas	<input type="checkbox"/>					
Leads	<input type="checkbox"/>	<input type="checkbox"/>				
Opportunities	<input type="checkbox"/>	<input type="checkbox"/>				
Price Books	<input type="checkbox"/>					
Products	<input type="checkbox"/>					
Solutions	<input type="checkbox"/>	<input type="checkbox"/>				

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Merchant Facilities	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Payment Options	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Payment Txn's	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Payment Types	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recurring Payments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Subscriptions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Subscription Payments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save Cancel

- 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

Permission Set Assignments

jeff challis

Save Cancel

1

Available Permission Sets

AAkonsult Payments Admin Users

AAkonsult Payments Sites

AAkonsult Payments Standard Users

2

Enabled Permission Sets

Case Feeds

Add

Remove

3

Save Cancel

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

Owner	 Carol Challis [Change]
Payment Gateway 	Payment Express
Payment Gateway UserId 	SalesforceComdev
Payment Gateway Password	*****
PxPay/PxFusion UserId 	AAkonsultPxDev
PxPay/PxFusion Password 	*****
Force SSL 	<input checked="" type="checkbox"/>
Credit Card Masking Policy 	2X...2X
Organisation Id 	00D900000000ltXdEAI

4. Enter your Payment Express UserID and password

Owner	 Carol Challis [Change]
Payment Gateway 	Payment Express
Payment Gateway UserID 	SalesforceComdev
Payment Gateway Password	*****
PxPay/PxFusion UserID 	AAkonsultPxDev
PxPay/PxFusion Password	*****
Force SSL 	<input checked="" type="checkbox"/>
Credit Card Masking Policy 	2X....2X
Organisation Id 	00D900000000ItXdEAI

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

The screenshot shows the 'Merchant Facility Edit' form. At the top, there are buttons for 'Save', 'Save & New', and 'Cancel'. Below this is the 'Information' section. On the left, the 'Payment Setting Name' is 'DEMO FACILITY'. The 'Active' checkbox is checked. The 'Primary' checkbox is checked. The 'Merchant Fee' field is empty. The 'Site URL' is 'https://aakpaytest-develop'. The 'Payment Method' section has two columns: 'Available' and 'Chosen'. The 'Available' column contains 'Invoice Me', 'Send By Post', and 'Pledge'. The 'Chosen' column contains 'Credit Card'. On the right, the 'Owner' is 'Carol Challis'. The 'Payment Gateway' dropdown menu is highlighted with a red box and shows 'Payment Express PxPay'. Below this, the 'Payment Gateway Userid' is 'SalesforceComdev', the 'Payment Gateway Password' is masked with '*****', the 'PxPay/PxFusion Userid' is 'AAkonsultPxDev', and the 'PxPay/PxFusion Password' is masked with '*****'. At the bottom, the 'Force SSL' checkbox is checked, the 'Credit Card Masking Policy' is '2X...2X', and the 'Organisation Id' is '00D900000000tXdEAI'.

Merchant Facility Edit	
Information	
Payment Setting Name	DEMO FACILITY
Active	<input checked="" type="checkbox"/>
Primary	<input checked="" type="checkbox"/>
Merchant Fee	
Site URL	https://aakpaytest-develop
Payment Method	
Available	Chosen
Invoice Me	Credit Card
Send By Post	
Pledge	
Owner	Carol Challis
Payment Gateway	Payment Express PxPay
Payment Gateway Userid	SalesforceComdev
Payment Gateway Password	*****
PxPay/PxFusion Userid	AAkonsultPxDev
PxPay/PxFusion Password	*****
Force SSL	<input checked="" type="checkbox"/>
Credit Card Masking Policy	2X...2X
Organisation Id	00D900000000tXdEAI

4. Enter both passwords

Merchant Facility Edit Save Save & New Cancel

Information

Payment Setting Name: DEMO FACILITY

Active: ☒

Primary: ☒

Merchant Fee:

Site URL: https://aakpaytest-develop

Payment Method: Available (Invoice Me, Send By Post, Pledge) → Chosen (Credit Card)

Owner: Carol Challis

Payment Gateway: Payment Express PxPay

Payment Gateway UserId: SalesforceComdev

Payment Gateway Password:

PxPay/PxFusion UserId: AAkonsultPxDev

PxPay/PxFusion Password:

Force SSL: ☒

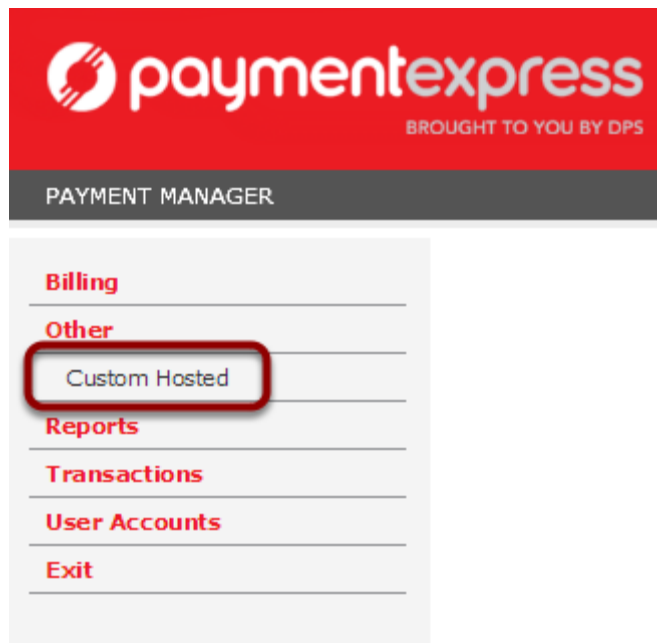
Credit Card Masking Policy: 2X...2X

Organisation Id: 00D900000000tXdEAI

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'



paymentexpress
BROUGHT TO YOU BY DPS

PAYMENT MANAGER

- Billing
- Other
 - Custom Hosted**
- Reports
- Transactions
- User Accounts
- Exit

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

Merchant Logo Top:	aakonsultpayments2.jpg ▼
Merchant Logo Bottom:	▼
Background Image:	▼
Page 1 Continue Button:	▼
Show Back Button:	<input type="checkbox"/>
Back Button Image:	▼
Show Cancel Button:	<input checked="" type="checkbox"/>
Cancel Button Image:	▼
Page 2 Button Image:	▼
Page 2 Retry Button:	▼
Hide Page 2:	Skip Page 2, HTTP Redirect ▼ (See note below.)
Link 1 Text:	
Link 1 URL:	
Link 2 Text:	
Link 2 URL:	
Link 3 Text:	
Link 3 URL:	

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










How to set up Payment Express - Px Fusion

Obtain your Px Fusion username from AAkonsult











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

Navigate to the Merchant Facilities tab

Select 'Payment Express Px Fusion' from the Payment Gateway drop down menu

Owner	 Carol Challis [Change]
Payment Gateway	 Payment Express Px Fusion 
Payment Gateway UserId	 SalesforceComdev
Payment Gateway Password	*****
PxPay/PxFusion UserId	 AAkonsultPxDev
PxPay/PxFusion Password	 *****
Force SSL	 <input checked="" type="checkbox"/>
Credit Card Masking Policy	 2X....2X
Organisation Id	 00D900000000tXdEAI

Enter both passwords

Owner	 Carol Challis [Change]
Payment Gateway	 Payment Express PxFusion 
Payment Gateway UserId	 SalesforceComdev
Payment Gateway Password	 *****
PxPay/PxFusion UserId	 AAkonsultPxDev
PxPay/PxFusion Password	 *****
Force SSL	 <input checked="" type="checkbox"/>
Credit Card Masking Policy	 2X....2X
Organisation Id	 00D900000000ltXdEAI

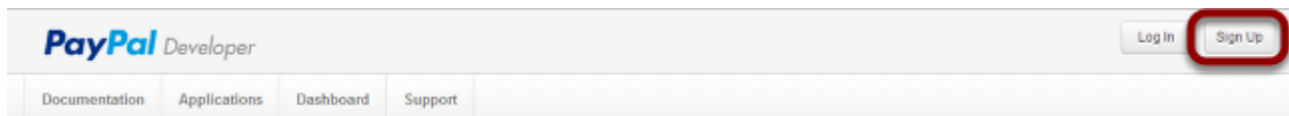
Save

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.

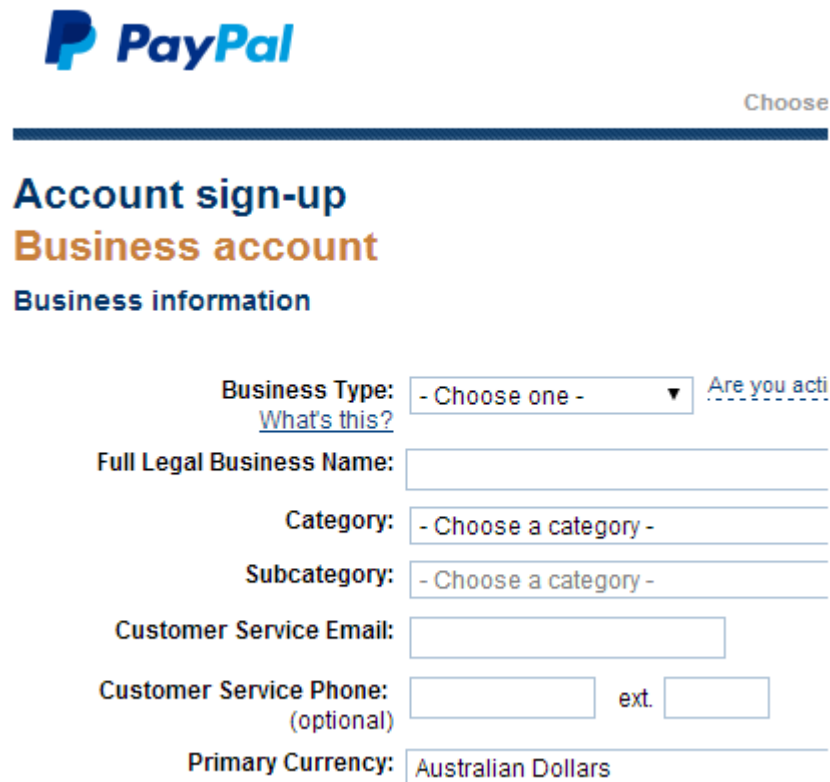
1. Sign up to PayPal

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



Select 'Sign Up'

1.2 Enter details for your organisation



The screenshot shows the PayPal Business account sign-up form. At the top is the PayPal logo. Below it, the text 'Choose' is visible. The main heading is 'Account sign-up' followed by 'Business account' in orange. Underneath is the section 'Business information'. The form fields include: 'Business Type' with a dropdown menu showing '- Choose one -' and a link 'What's this?'; 'Full Legal Business Name' with a text input field; 'Category' with a dropdown menu showing '- Choose a category -'; 'Subcategory' with a dropdown menu showing '- Choose a category -'; 'Customer Service Email' with a text input field; 'Customer Service Phone (optional)' with two text input fields for the main number and an extension; and 'Primary Currency' with a dropdown menu showing 'Australian Dollars'.

Business Type: - Choose one - [What's this?](#) Are you acti

Full Legal Business Name:

Category: - Choose a category -

Subcategory: - Choose a category -

Customer Service Email:

Customer Service Phone: ext.
(optional)

Primary Currency: Australian Dollars

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

Go to Payment Card Credentials

Test Account	Date Created
Test Account: jeff.c_134959[redacted]@aakonsult.com	Oct 6, 2012 23:24:38 PDT
API Username: jeff.c_134959[redacted]_api1.aakonsult.com	
API Password: 134959[redacted]	
Signature: A3Icz2VYEITm3CON31Uq7LfrU38[redacted]OkEe	

To download the certificate, log into the sandbox test account profile and remove the 3 token

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

PayPal			
PayPal API Username ⓘ	<input type="text" value="sdk-three_api1.sdk.com"/>	PayPal Environment ⓘ	<input type="text" value="Sandbox"/>
PayPal API Password ⓘ	<input type="password" value="*****BG7Q"/>		
PayPal API Signature ⓘ	<input type="password" value="*****"/>		

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



Log in to your account

Email address

Password

Log In

[Forgotten your email address or password?](#)

Sign Up for Free

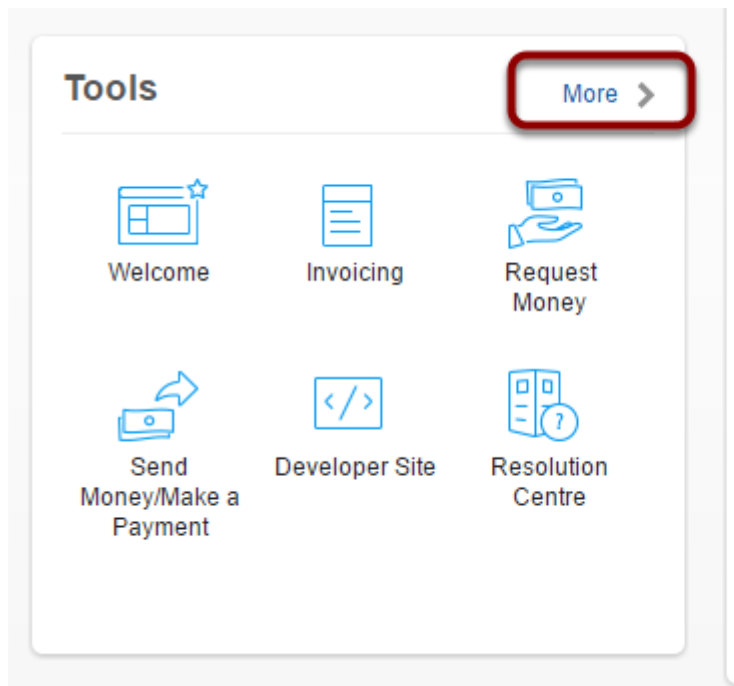
Online peace of mind

With PayPal, you're protected up to \$20,000 if your eligible purchase doesn't arrive or match its description.

You're in control

You don't need a balance in your PayPal account as we'll automatically deduct purchases from whichever payment method you choose – your bank account, credit or debit card.

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

Tools

Accept payments wherever you do business



Email an Invoice



Express Checkout



Mass Payments



Get Paid on Your Website



Get Paid in Person



Get Paid in Your Store



Rec: Payn

Grow your business



Integrate PayPal



Logo Centre

Manage your business



Send money



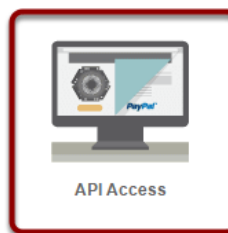
My Business Set-up



GST Set-up and Management



PayPal Developer Site



API Access



Resolution Centre



Ship Calcu

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

Request API Credentials

[Back to My Profile](#)

API credentials consist of three elements:

- An API username
- An API password
- Either an API signature or an API SSL client-side certificate

If you're using a shopping cart or solution provider, ask whether you need an API signature or a certificate.

☒ **Request API signature** if your shopping cart or solution provider has asked for an API username, password, and signature, or if you're developing a custom shopping cart.

☐ **Request API certificate** if your shopping cart or solution provider requires a file-based certificate.

Need help deciding which credential is right for your needs? [Learn more](#)

By clicking **Agree and Submit**, I agree to the [API Licence Agreement and Terms of Use](#).

Agree and Submit

Cancel

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

PayPal

PayPal API Username	sdk-three_api1.sdk.com	PayPal Environment	Sandbox
PayPal API Password	*****BG7Q		
PayPal API Signature	*****		

3.7 Set the PayPal Environment to 'Production'

PayPal

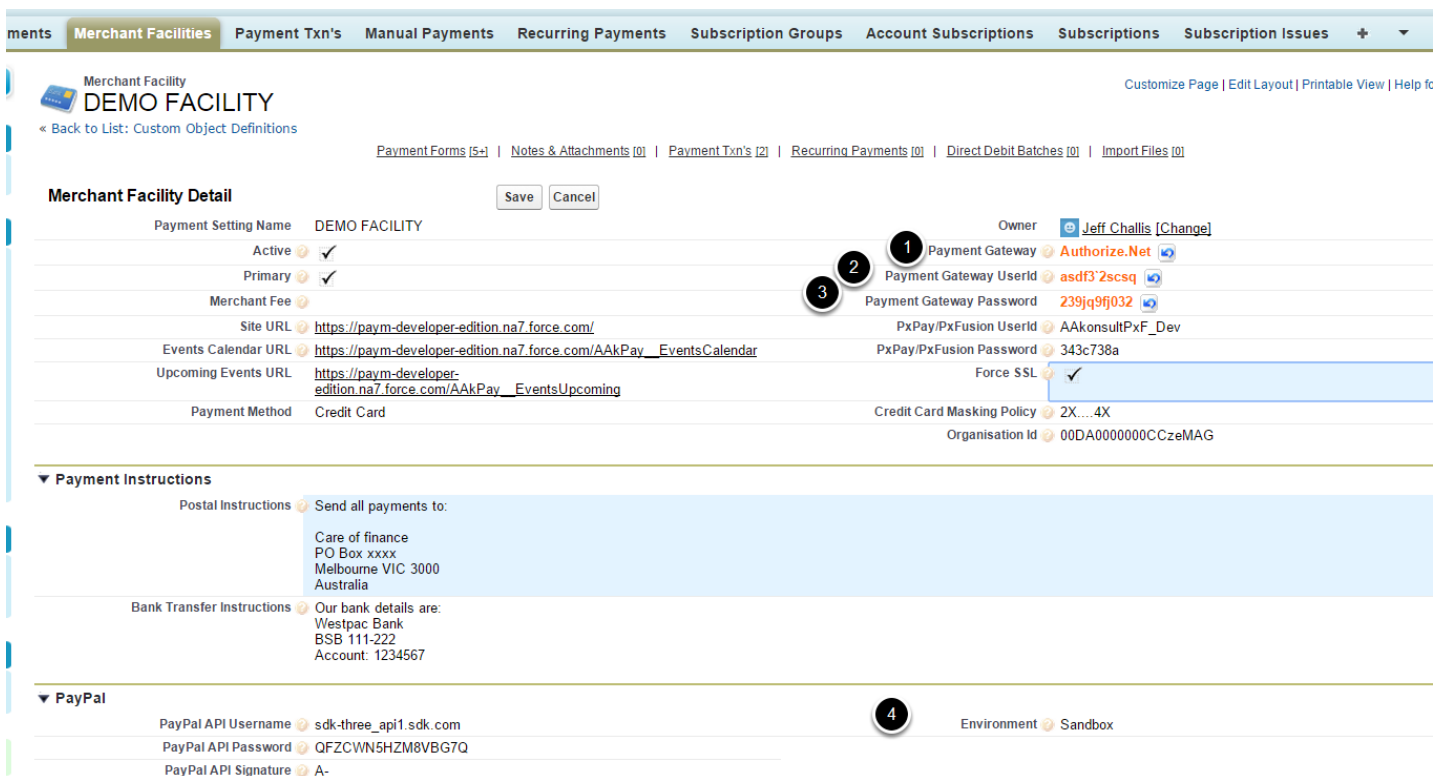
PayPal API Username	sdk-three_api1.sdk.com	PayPal Environment	Production
PayPal API Password	*****BG7Q		
PayPal API Signature	*****		

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



Merchant Facility

DEMO FACILITY

« Back to List: Custom Object Definitions

Payment Forms [5] | Notes & Attachments [0] | Payment Txn's [2] | Recurring Payments [0] | Direct Debit Batches [0] | Import Files [0]

Merchant Facility Detail [Save] [Cancel]

Payment Setting Name: DEMO FACILITY

Active: ☒

Primary: ☒

Merchant Fee:

Site URL: <https://paym-developer-edition.na7.force.com/>

Events Calendar URL: https://paym-developer-edition.na7.force.com/AAkPay__EventsCalendar

Upcoming Events URL: https://paym-developer-edition.na7.force.com/AAkPay__EventsUpcoming

Payment Method: Credit Card

Owner: Jeff Challis [Change]

1 Payment Gateway: Authorize.Net

2 Payment Gateway UserId: asdf3'2scsq

3 Payment Gateway Password: 239jq9fj032

PxPay/PxFusion UserId: AAKonsultPxDev

PxPay/PxFusion Password: 343c738a

Force SSL: ☒

Credit Card Masking Policy: 2X...4X

Organisation Id: 00DA0000000CCzeMAG

Payment Instructions

Postal Instructions: Send all payments to:

Care of finance
PO Box xxxx
Melbourne VIC 3000
Australia

Bank Transfer Instructions: Our bank details are:
Westpac Bank
BSB 111-222
Account: 1234567

PayPal

PayPal API Username: sdk-three_api1.sdk.com

PayPal API Password: QFZCWN5HZM8VBG7Q

PayPal API Signature: A-

Environment: Sandbox

4

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

The screenshot displays a registration form with the following fields: Last Name, Phone*, Mobile Phone, Email*, Subscribe to Email Updates (checkbox), Street*, Suburb/Town*, State*, Postcode*, and Country*. The Street* field contains the text "109 f". A red rectangular box highlights the dropdown menu that appears below the Street* field, which is powered by Google. The dropdown lists the following suggestions: "109 Flinders Lane, Melbourne, Victoria", "109 Flinders Street, Melbourne, Victoria", "109 Forest Road, Hurstville, New South Wales", "109 Ferntree Gully Road, Mount Waverley, Victoria", and "109 Fitzroy Street, Saint Kilda, Victoria". Below the form, there are two sections: "Transaction Details" and "My Payment Details". The "Transaction Details" section includes a "Payment Amount" field with the value "0" and a "Payment By" section with two radio buttons: "Individual" (selected) and "Company". The "My Payment Details" section is currently empty.

Transaction Details	
Payment Amount	0
Payment By	<input checked="" type="radio"/> Individual <input type="radio"/> Company

My Payment Details	
--------------------	--

[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 Google Places, please see [How to setup Google Places Address Validation](#)

2. DataTools Kleber

Last Name*

Phone*

Mobile Phone

Email*

Subscribe to Email Updates ☐

i Street* PO Box 175, Willia

Suburb/Town* PO Box 175, WILLIAMS WA 6391

State* PO Box 175, WILLIAMSTOWN SA 5351

Postcode* PO Box 175, WILLIAMSTOWN VIC 3016

Country* Australia

Transaction Details

Payment Amount 0

Payment By ☒ Individual ☐ Company

[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:

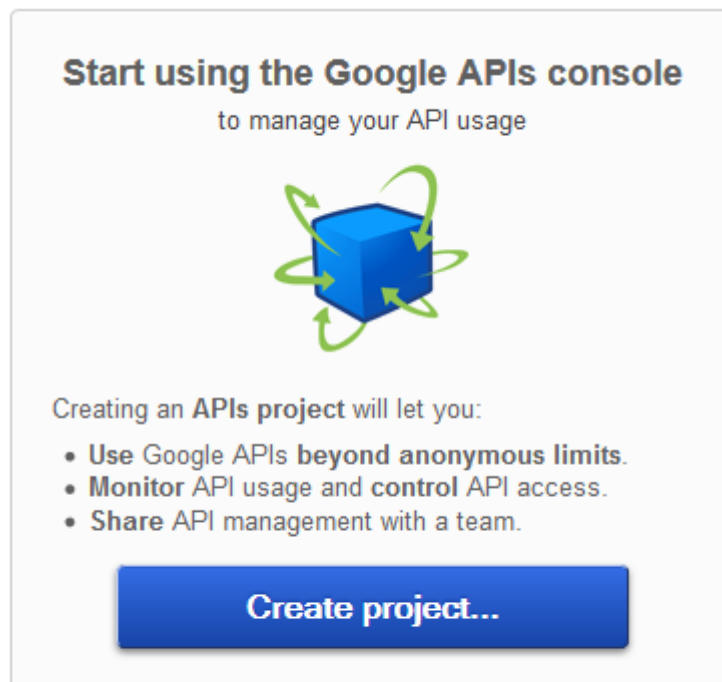
1. Sign up for a Google Places API Key
2. Enter key into Merchant Facility and select Google Places as the Address Helper

1. Login to the Google API Console

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

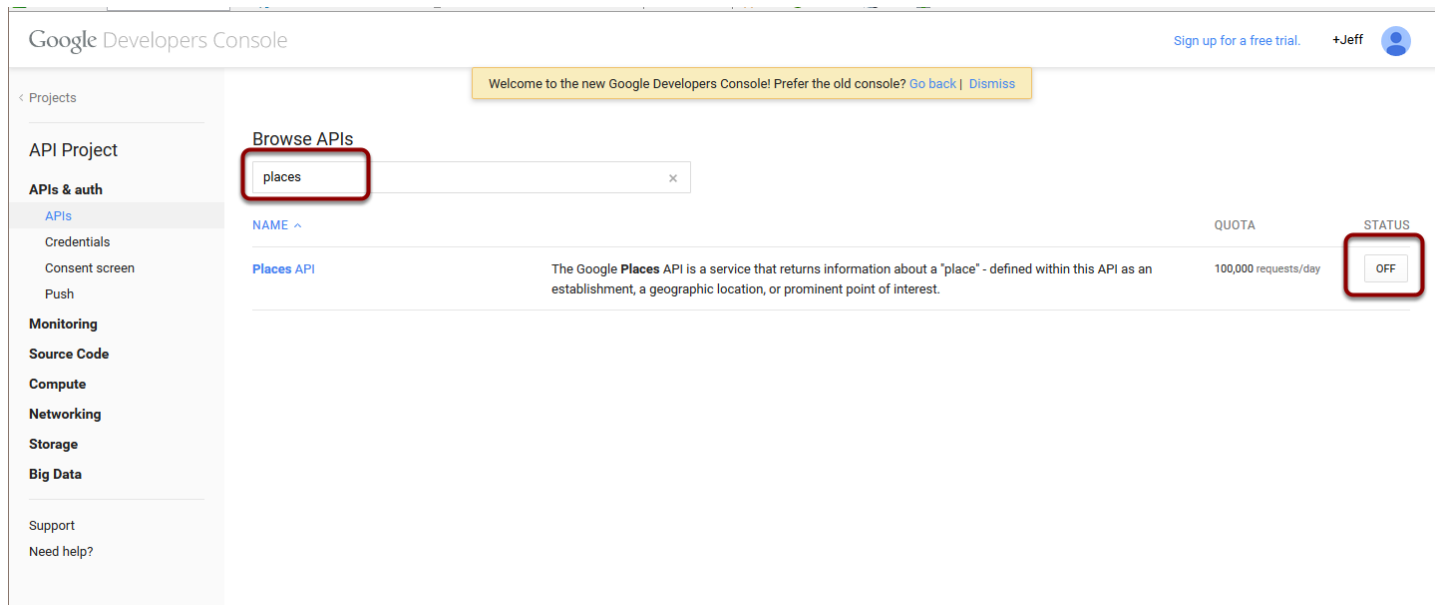
You will be asked to login. If you do not already have an account then sign up for a free account.

2. Create or using an existing project



[Code Home](#) - [Privacy Policy](#)

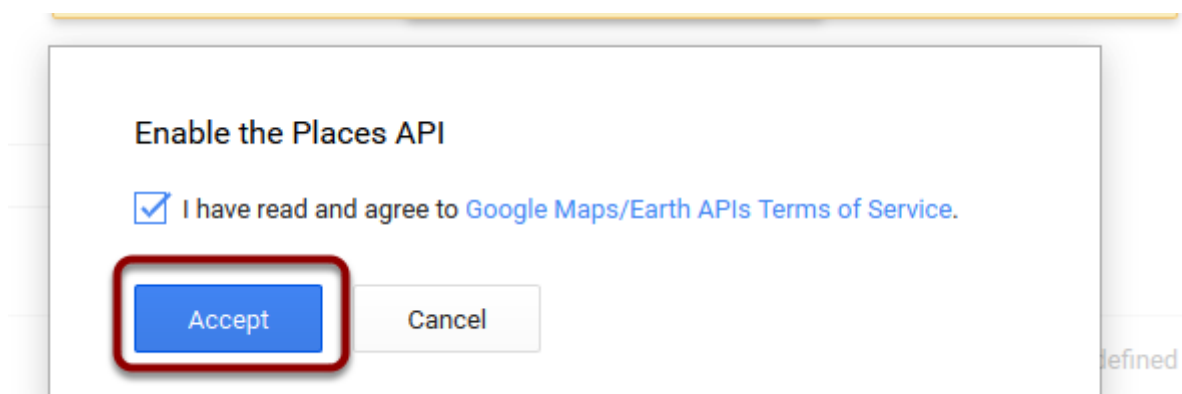
3. Locate Places API and Start



Type "Places" in the browse APIs selection.

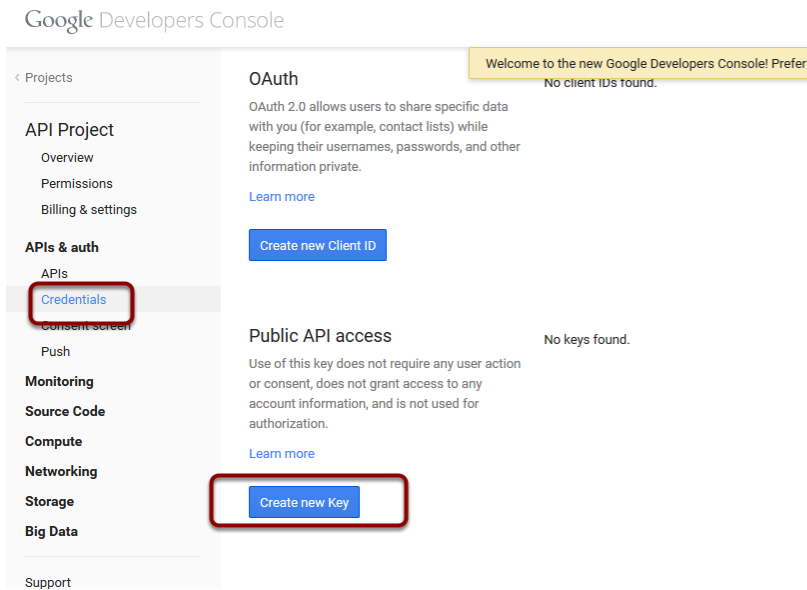
Once you have located the "Places API", press the "OFF" button to activate the API

4. Agree to Terms and Conditions



Read, understand and agree to the Terms and Conditions

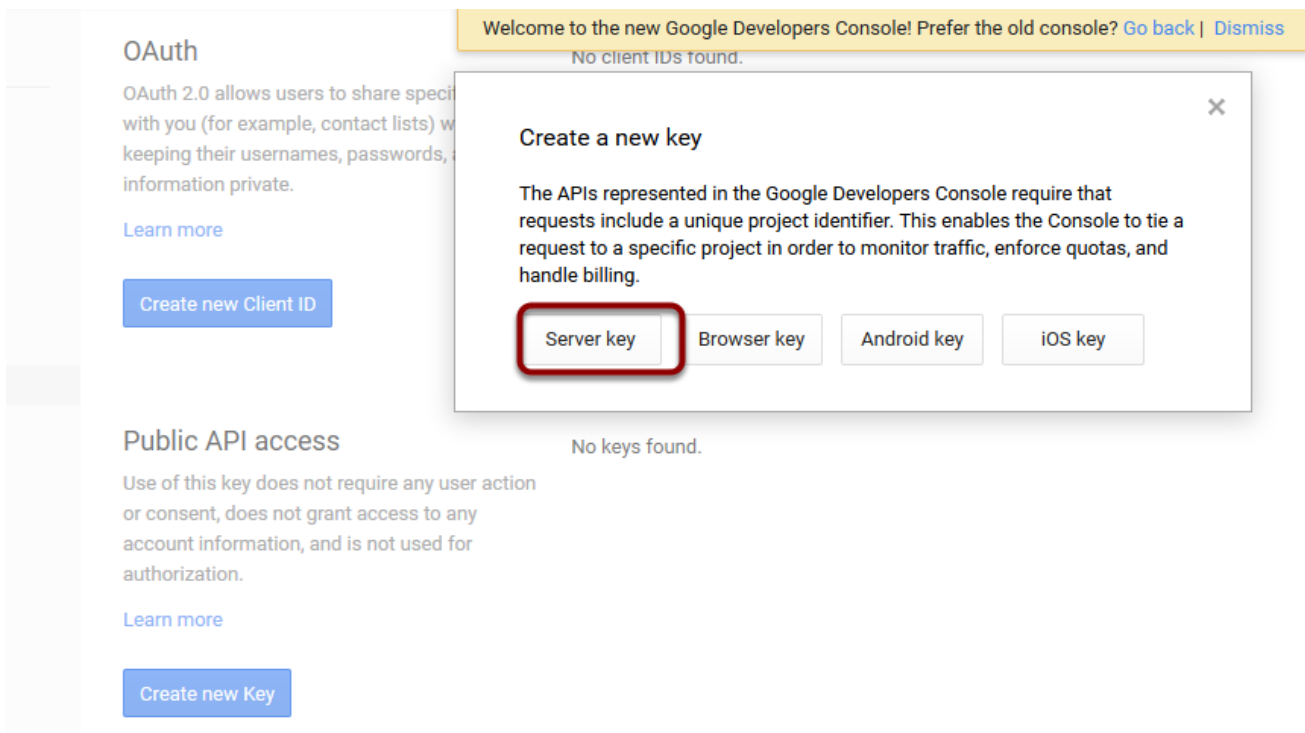
5. Create Credentials



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

Welcome to the new Google Developers Console! Prefer the old console? [Go back](#) | [Dismiss](#)

No client IDs found.

Create a server key and configure allowed IPs

This key should be kept secret on your server.

Every API request is generated by software running on a machine that you control. Per-user limits will be enforced using the address found in each request's `userIp` parameter, (if specified). If the `userIp` parameter is missing, your machine's IP address will be used instead. [Learn more](#)

ACCEPT REQUESTS FROM THESE SERVER IP ADDRESSES

One IP address or subnet per line. Example: 192.168.0.1, 172.16.0.0/16, 2001:db8::1 or 2001:db8::/64

13.108.0.0/15
13.110.0.0/16
96.43.144.0/20
136.146.0.0/15
182.50.76.0/22
185.79.140.0/22
202.129.242.0/23
204.14.232.0/21

Create

Cancel

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

Key for server applications

API KEY	AlzaSyA [REDACTED] h7eZ5xE
IPS	13.108.0.0/15 13.110.0.0/16 96.43.144.0/20 More ...
ACTIVATION DATE	Feb 14, 2015, 9:10:00 AM
ACTIVATED BY	[REDACTED] (you)

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

9. Update Salesforce with your Google API Key

Form Width 500	Theme redmond
Mobile Responsive Yes - iFrame Breakout	Custom Theme Resource Name
Background Colour	CAPTCHA Theme red
▼ Address Validation	
1 Address Helper Google Places	Enable Geonames Autocomplete <input checked="" type="checkbox"/>
2 Address Password/Token Alza [REDACTED] 2xE	Default State
Address Helper URL	Default Country Australia
	IP Defaulting <input checked="" type="checkbox"/>
▼ Account, Contact, Opportunity Matching	
Account Matching Method Create Using Contacts Name	Override Target Contact Values Yes
Automatic Matching Match and Create New If No Match Found	Create Opportunity <input checked="" type="checkbox"/>
Account Template	Create Opportunity Line Items <input type="checkbox"/>
Contact Template	Bring Back

Navigate to the "Merchant Facility" Tab in Salesforce. Press GO button 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.

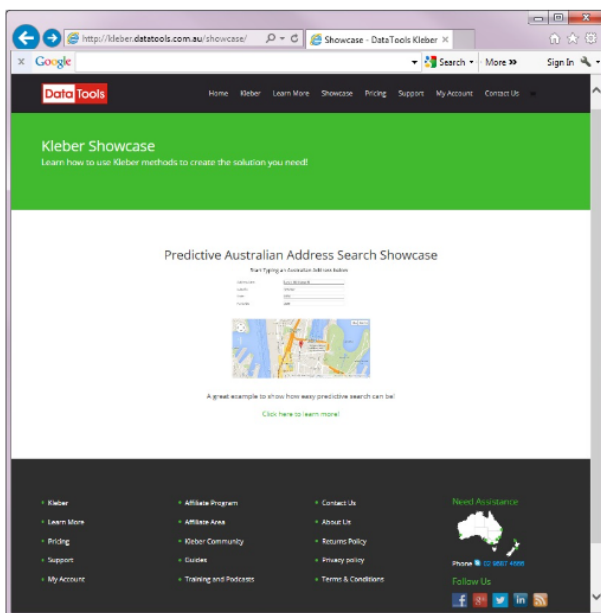
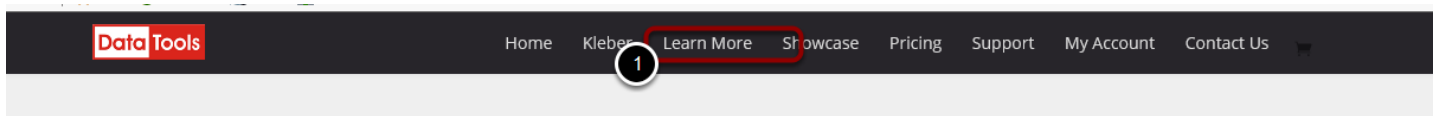
Press Save

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



Easy to Try

Kleber allows you to try out all of the options – even before you become a subscriber!

Our **showcases** not only describe real life examples of how you can implement Kleber data methods – but they also allow you to enter your own information into the showcase so that you can see it working in action.

Each individual data method also has a detailed method description accessed by clicking on the method itself in the **method list**. At this detailed level you will find a working example at the top where you can enter data and see how the results are returned.

If you then decide to trial the product further **you can register here to** receive \$50 free credit! Registering gives you **full access** to the Kleber platform and all data methods so that you can implement them into your own environment – and the \$50 free credit allows you to test out any method or methods you like!


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@aaconsult.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

Pre-Register

 Username

 Email

 Password

 Confirm Password

- ☐ I have read and accept the [Kleber terms & conditions](#) and the [Data tools privacy policy](#)
- ☐ I would like to receive general communications from Data Tools

[Register](#)

FREE TRIAL!

Register here, you will receive **\$50** of FREE credit and 90 days to use it in your trial of Kleber.

This trial is the full version. So if you want to continue using Kleber once the credit runs out all you need to do is purchase a plan!

Enter your details in this and the following screen.

3. Setup Kleber API



Setup Kleber

Start by setting up your product



Add Credit

Need to add credit?



Balance & Usage

Current Balance



My Profile

Edit your details?

Know someone else that could benefit from Kleber? Become a DataTools Affiliate and get rewarded in cash for your recommendations, [Learn More](#) or [Start Now](#).
Already an affiliate? [Click Here](#)

Notifications

- [Scheduled Maintenance – Green Alert Status](#) - Please note that the maintenance work on the DataTools [...]
- [Scheduled Maintenance – Yellow Phase of Monitoring](#) - Please note that the maintenance work on the DataTools [...]
- [Scheduled Maintenance – Server Upgrade](#) - Please note that maintenance work on the DataTools Kleb [...]
- [Maintenance – Interruption to ABN Lookup service](#) - We have been advised by our ABN Lookup data provider th [...]
- [Incident Report – High Latency Issue](#) - Report Date/Time: 28th October 2014 10:55am Confidentialia [...]

Click the "Start by Setting up your product link"

4. Copy the Kleber API

Getting Started

Detail information on all of the Kleber methods available and sample code on how to access these methods can be found in the online [Kleber Developers Guide](#).

All the methods will require two important pieces of information that are referred to in the documents but not made available in the documents, these are the Kleber Server Path and the Request Key.

Your Kleber Server Path

Below are two Kleber Server paths. The first address is for your live production environment and the second is for development and testing. Interacting with both server addresses is identical. Transaction costs apply for calls made to either server.

<https://kleber.datatoolscloud.net.au>
<http://kleber-devuat.datatoolscloud.net.au>

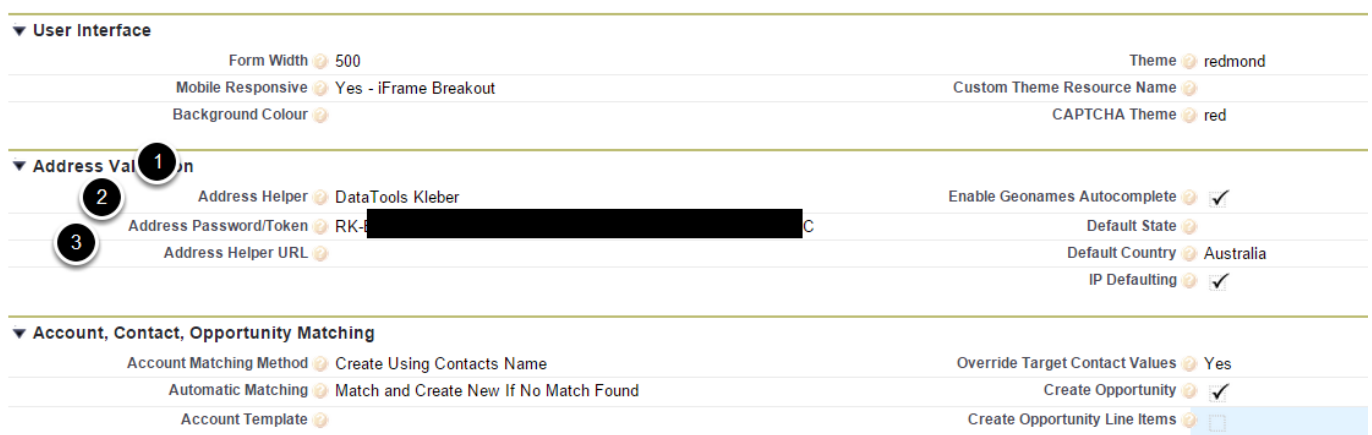
Your Kleber Request Key

The Request Key is used by Kleber to identify your account when making calls the Kleber server. Below is your Kleber Request Key.

Request Key: RK-E[REDACTED]E10-5[C]

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 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

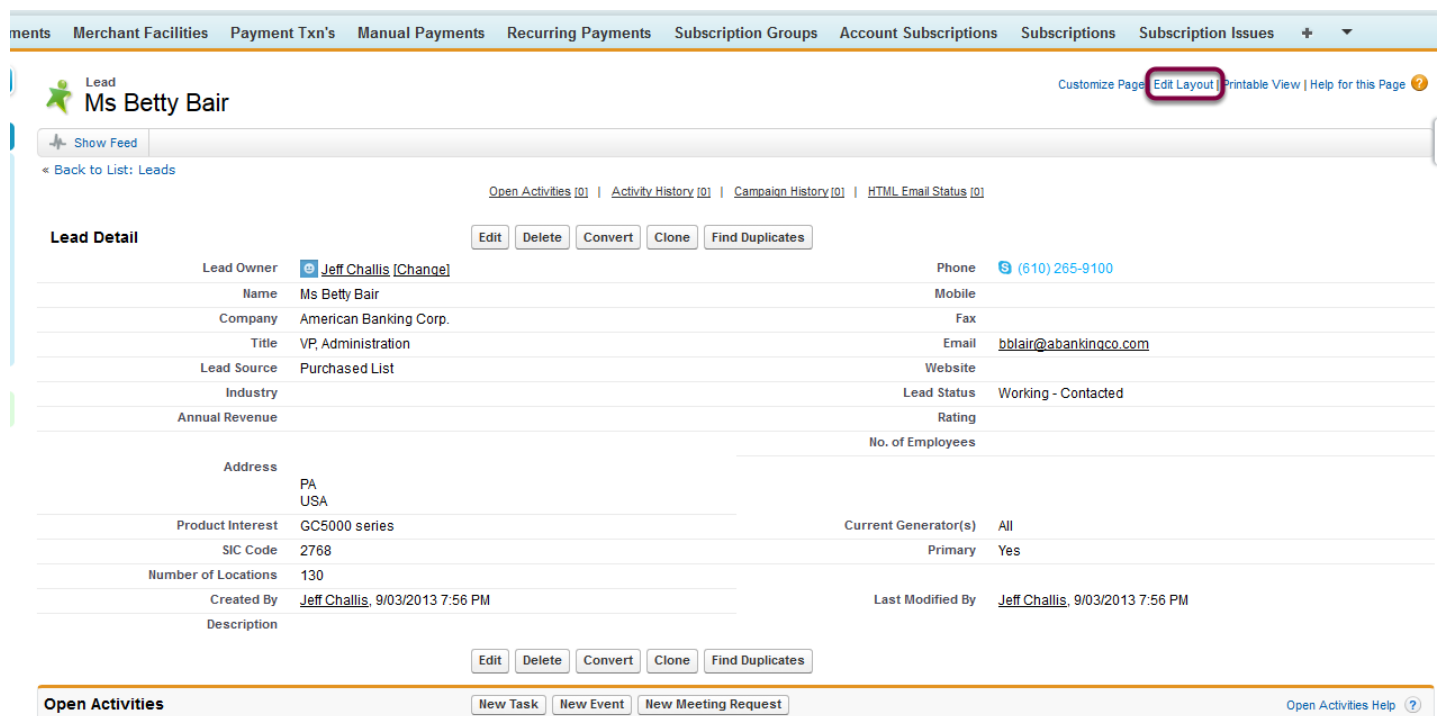
You must first have DataTools Kleber setup.

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



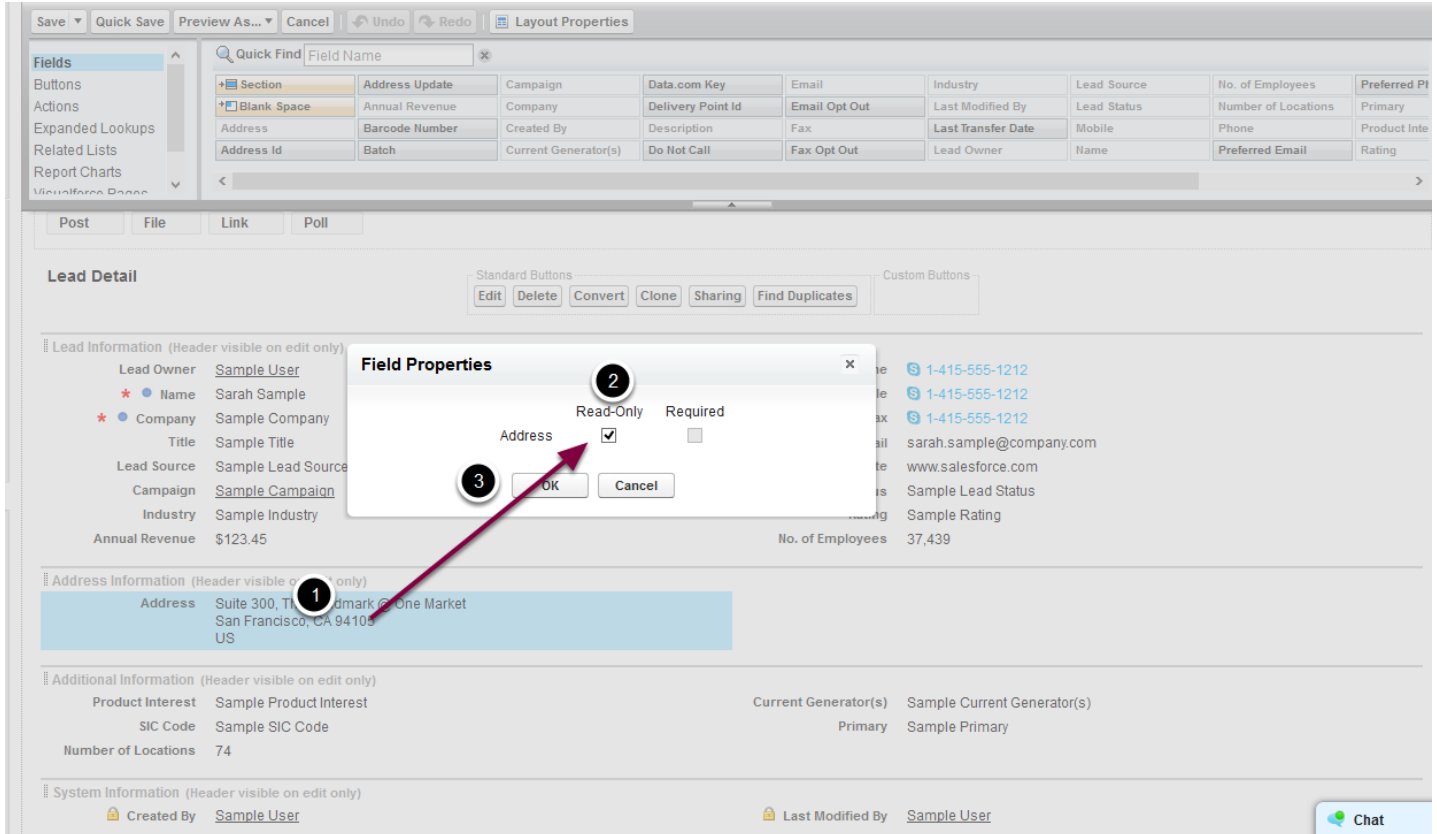
The screenshot shows the Salesforce CRM interface for a Lead record. The top navigation bar includes links for 'ments', 'Merchant Facilities', 'Payment Txn's', 'Manual Payments', 'Recurring Payments', 'Subscription Groups', 'Account Subscriptions', 'Subscriptions', and 'Subscription Issues'. The 'Edit Layout' link is highlighted with a red box. The lead details are as follows:

Lead Detail	Edit Delete Convert Clone Find Duplicates
Lead Owner	@ Jeff Challis [Change]
Name	Ms Betty Bair
Company	American Banking Corp.
Title	VP, Administration
Lead Source	Purchased List
Industry	
Annual Revenue	
Address	PA USA
Product Interest	GC5000 series
SIC Code	2768
Number of Locations	130
Created By	Jeff Challis, 9/03/2013 7:56 PM
Description	
Phone	(610) 265-9100
Mobile	
Fax	
Email	bblair@abankingco.com
Website	
Lead Status	Working - Contacted
Rating	
No. of Employees	
Current Generator(s)	All
Primary	Yes
Last Modified By	Jeff Challis, 9/03/2013 7:56 PM
Open Activities	New Task New Event New Meeting Request Open Activities Help

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

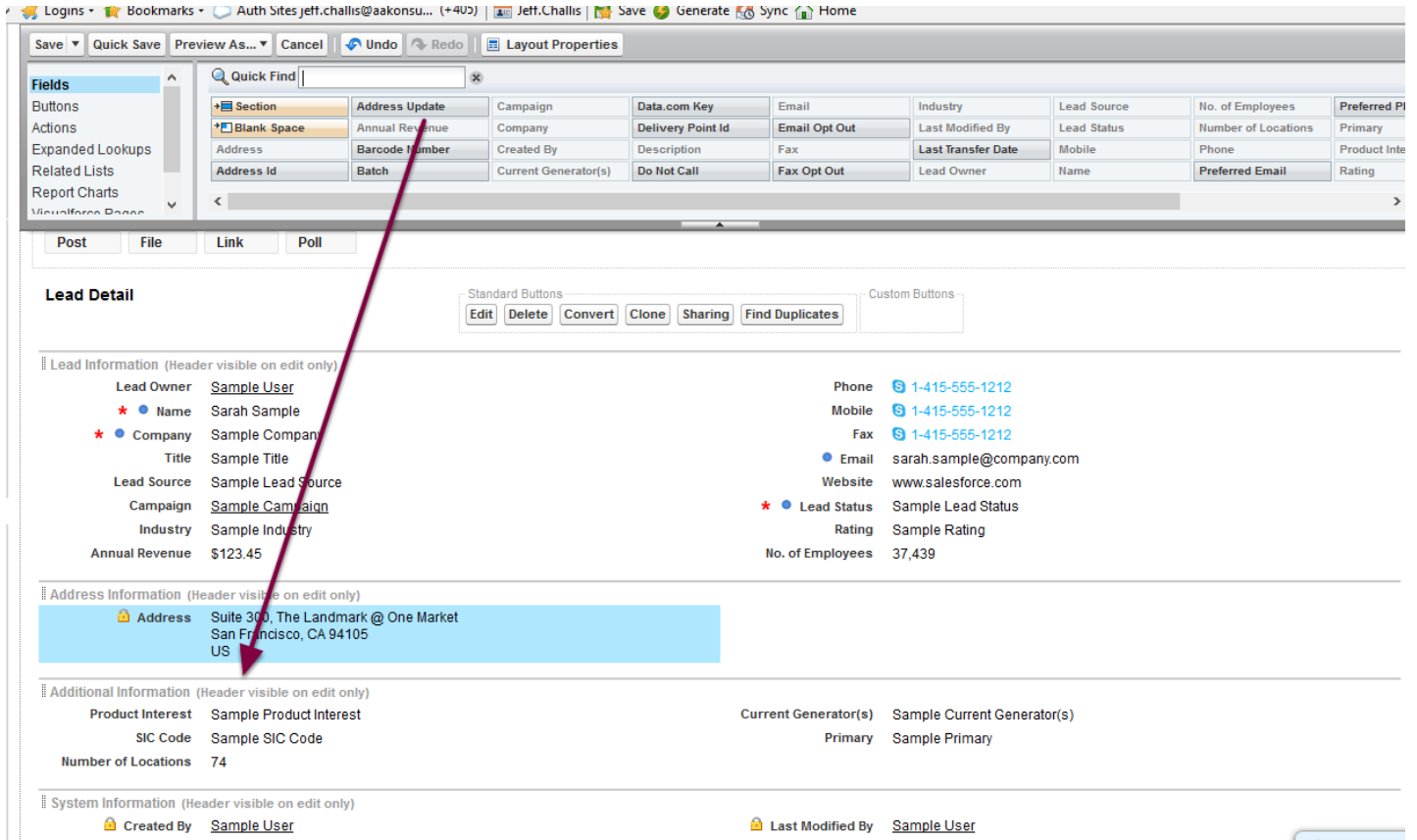
1.2 Make address fields read only



The screenshot shows the Salesforce 'Lead Detail' page. A 'Field Properties' dialog box is open for the 'Address' field. The 'Read-Only' checkbox is checked, and the 'Required' checkbox is unchecked. The 'OK' button is highlighted. Numbered callouts indicate the steps: 1. Double-click on the address field, 2. Select Read Only, 3. Click OK to exit.

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

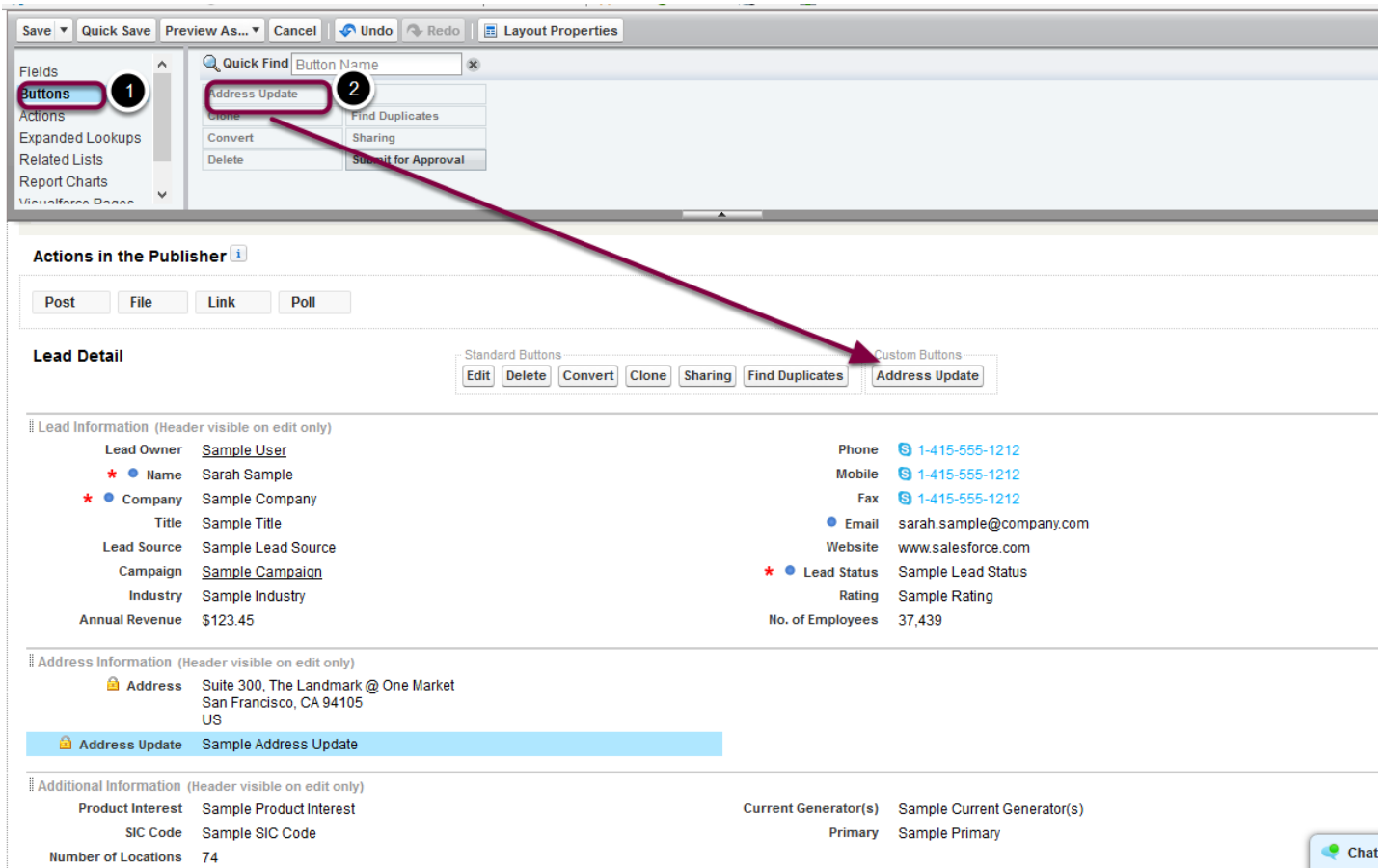


The screenshot shows the AAKonsult interface with a 'Lead Detail' page. The 'Fields' list on the left includes 'Address Update', 'Blank Space', 'Address', 'Address Id', 'Batch', 'Campaign', 'Data.com Key', 'Delivery Point Id', 'Email', 'Email Opt Out', 'Fax', 'Fax Opt Out', 'Industry', 'Last Modified By', 'Last Transfer Date', 'Lead Source', 'Lead Status', 'Lead Owner', 'Name', 'No. of Employees', 'Number of Locations', 'Primary', 'Product Interest', 'SIC Code', 'Number of Locations', 'Rating', and 'Preferred Email'. The 'Address Information' section shows the 'Address' field with the value 'Suite 300, The Landmark @ One Market San Francisco, CA 94105 US'. A red arrow points from the 'Address Update' field in the 'Fields' list to the 'Address' field in the 'Address Information' section.

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



The screenshot shows the Salesforce Publisher interface. In the left sidebar, the 'Buttons' selection object is highlighted with a red circle labeled '1'. In the 'Quick Find' dropdown, the 'Address Update' button is highlighted with a red circle labeled '2'. A red arrow points from the 'Address Update' button in the dropdown to the 'Custom Buttons' section in the 'Lead Detail' area, where it is added to the 'Address Update' button group.

Lead Detail

Standard Buttons: Edit, Delete, Convert, Clone, Sharing, Find Duplicates, Address Update

Lead Information (Header visible on edit only)

Lead Owner	Sample User	Phone	1-415-555-1212
Name	Sarah Sample	Mobile	1-415-555-1212
Company	Sample Company	Fax	1-415-555-1212
Title	Sample Title	Email	sarah.sample@company.com
Lead Source	Sample Lead Source	Website	www.salesforce.com
Campaign	Sample Campaign	Lead Status	Sample Lead Status
Industry	Sample Industry	Rating	Sample Rating
Annual Revenue	\$123.45	No. of Employees	37,439

Address Information (Header visible on edit only)

Address: Suite 300, The Landmark @ One Market
San Francisco, CA 94105
US

Address Update Sample Address Update

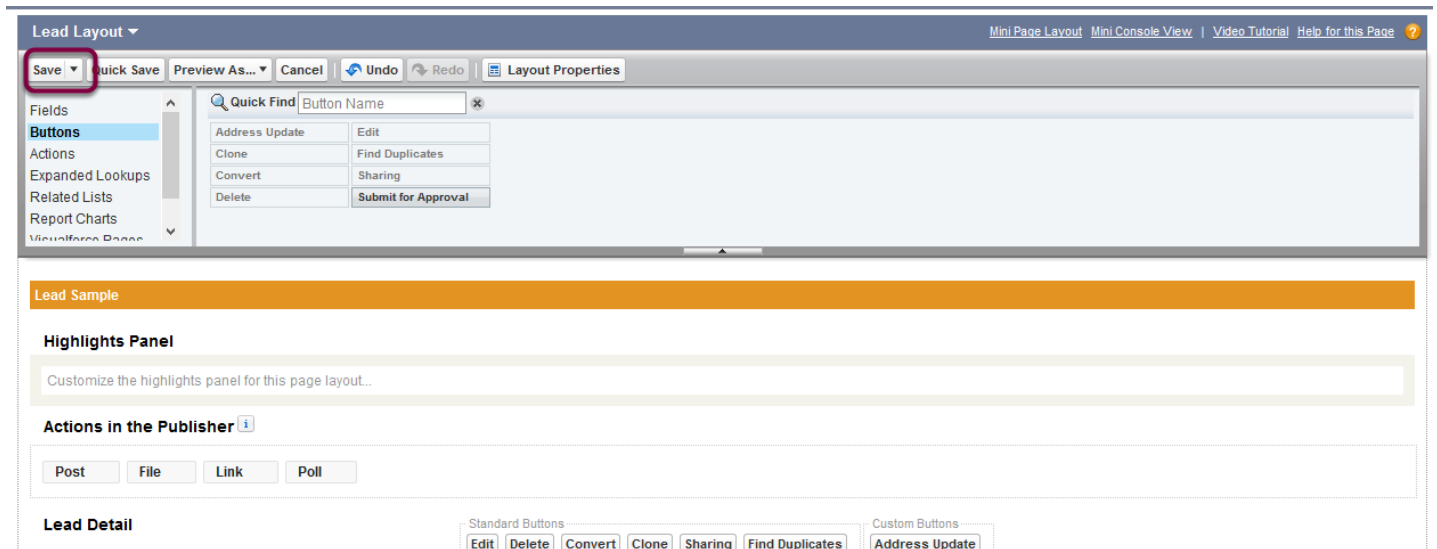
Additional Information (Header visible on edit only)

Product Interest	Sample Product Interest	Current Generator(s)	Sample Current Generator(s)
SIC Code	Sample SIC Code	Primary	Sample Primary
Number of Locations	74		

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

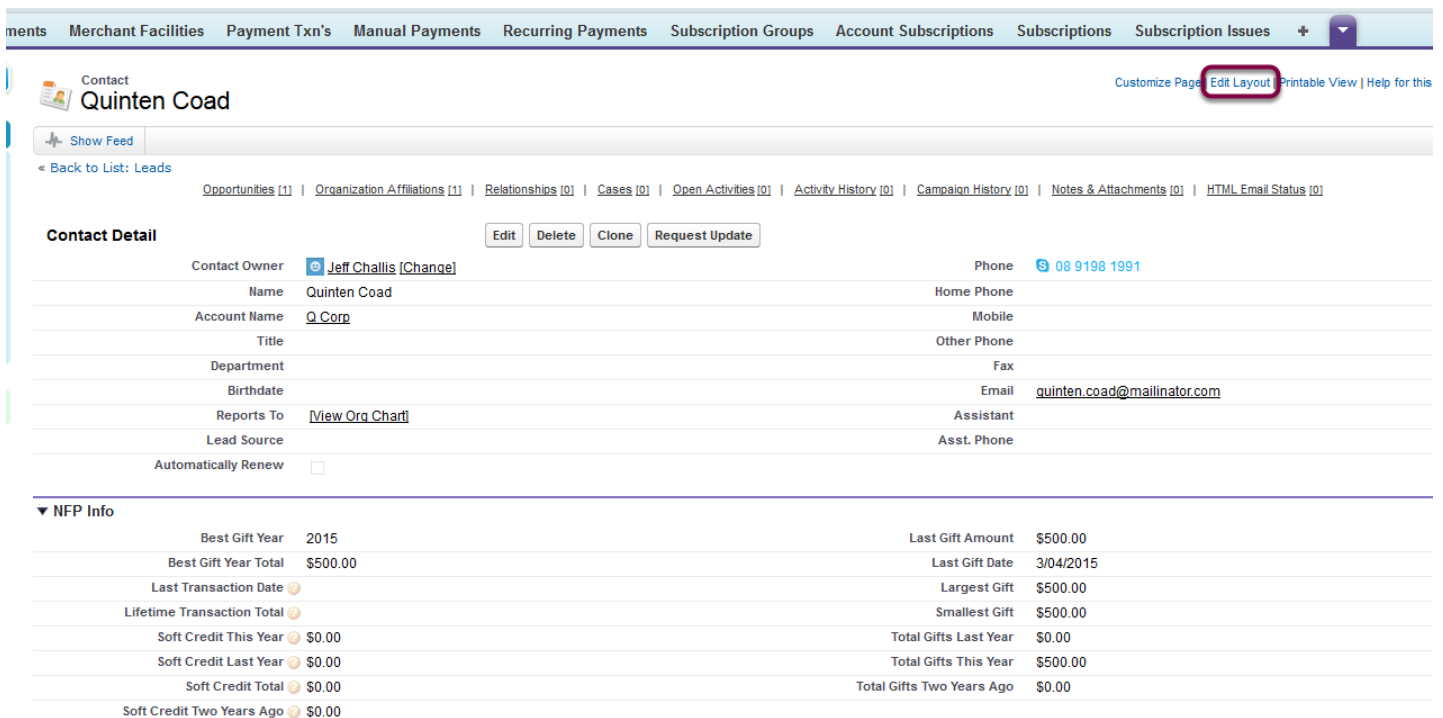


Make sure you press the Save button for closing the screen

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



ments Merchant Facilities Payment Txn's Manual Payments Recurring Payments Subscription Groups Account Subscriptions Subscriptions Subscription Issues +

Contact **Quinten Coad** Customize Page **Edit Layout** Printable View | Help for this

Show Feed

Back to List: Leads

Opportunities [1] | Organization Affiliations [1] | Relationships [0] | Cases [0] | Open Activities [0] | Activity History [0] | Campaign History [0] | Notes & Attachments [0] | HTML Email Status [0]

Contact Detail Edit Delete Clone Request Update

Contact Owner	Jeff Challis [Change]	Phone	08 9198 1991
Name	Quinten Coad	Home Phone	
Account Name	Q Corp	Mobile	
Title		Other Phone	
Department		Fax	
Birthdate		Email	quinten.coad@mailinator.com
Reports To	View Org Chart	Assistant	
Lead Source		Asst. Phone	
Automatically Renew	<input type="checkbox"/>		

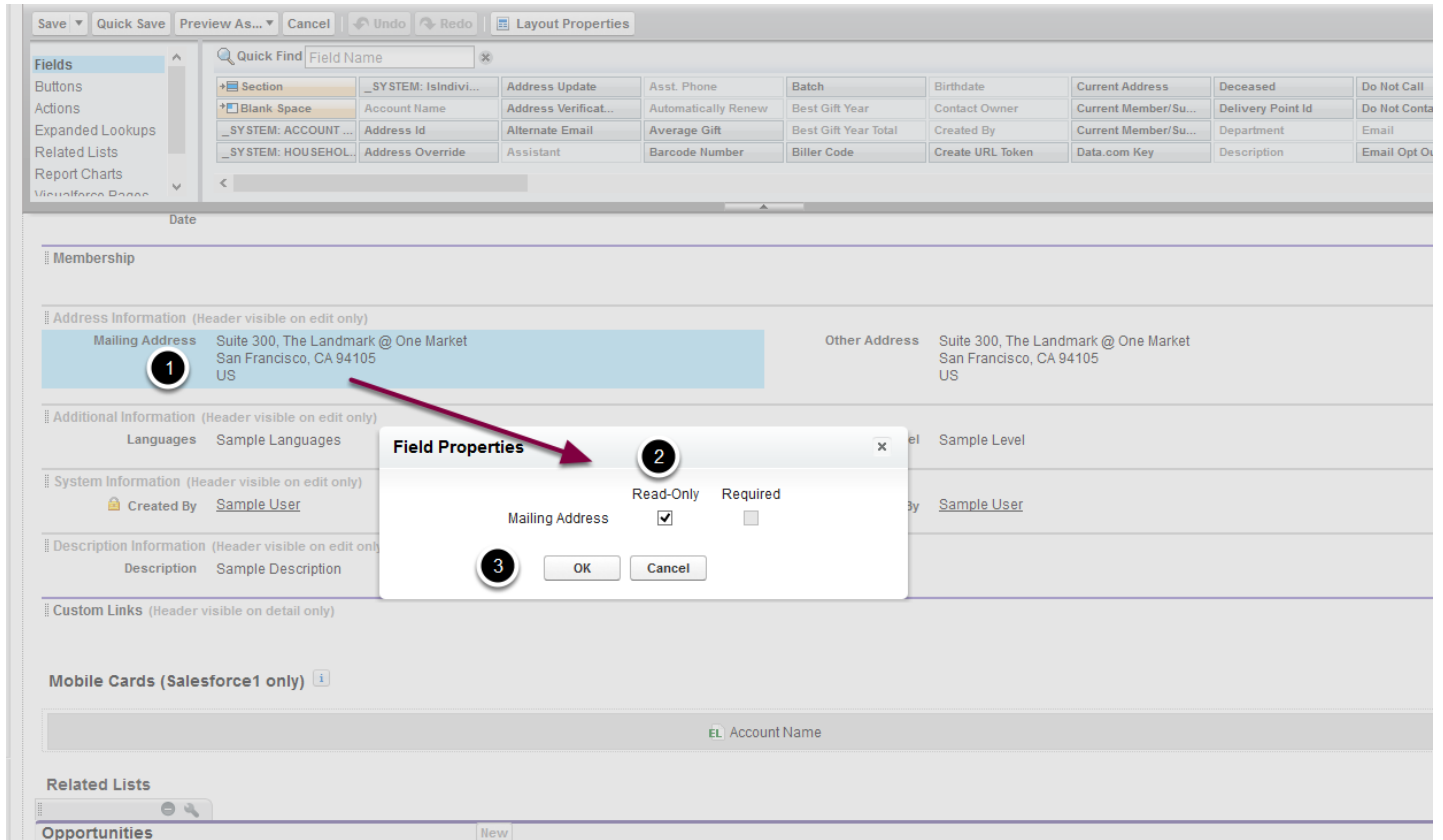
▼ NFP Info

Best Gift Year	2015	Last Gift Amount	\$500.00
Best Gift Year Total	\$500.00	Last Gift Date	3/04/2015
Last Transaction Date		Largest Gift	\$500.00
Lifetime Transaction Total		Smallest Gift	\$500.00
Soft Credit This Year	\$0.00	Total Gifts Last Year	\$0.00
Soft Credit Last Year	\$0.00	Total Gifts This Year	\$500.00
Soft Credit Total	\$0.00	Total Gifts Two Years Ago	\$0.00
Soft Credit Two Years Ago	\$0.00		

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

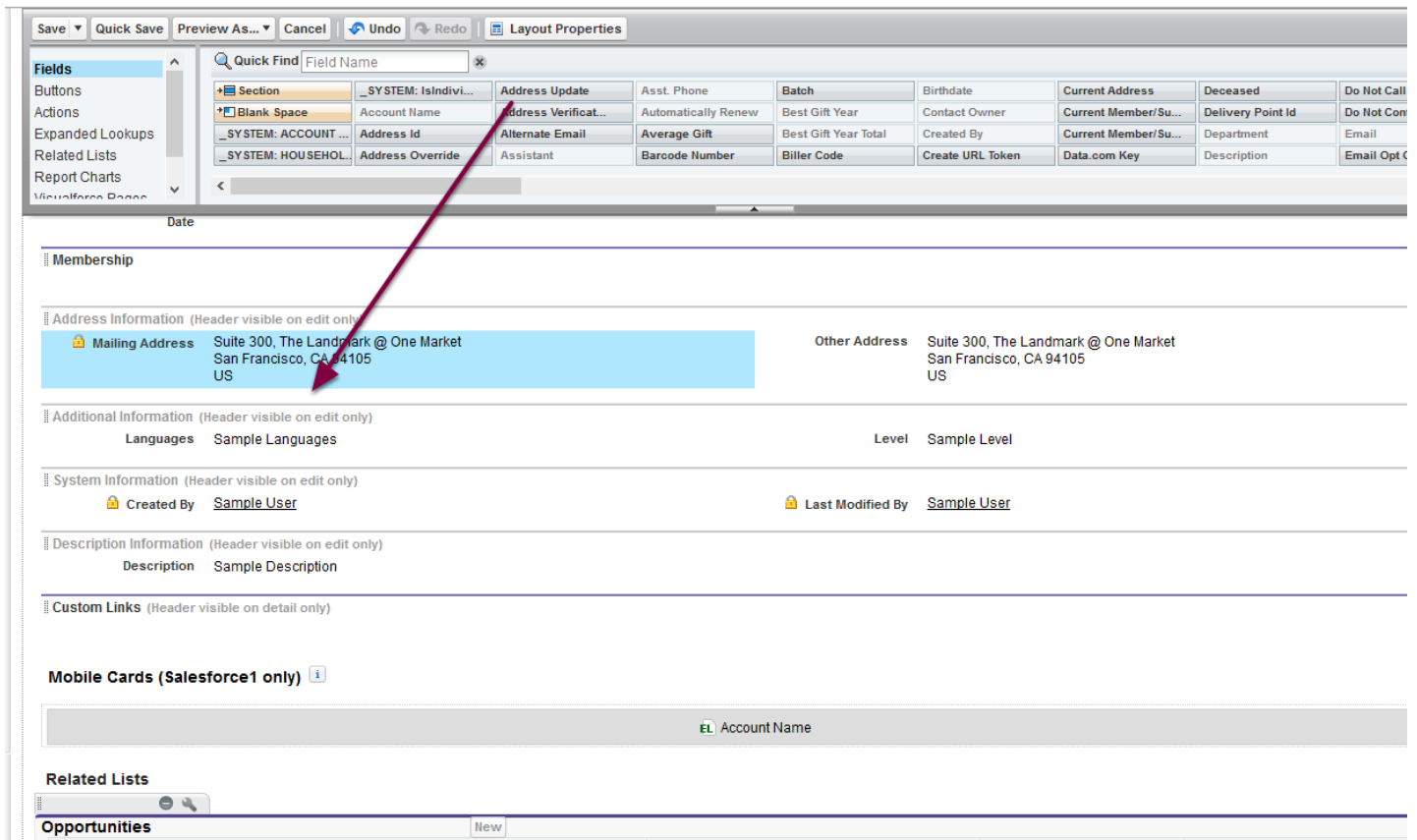
2.2 Make address fields read only



The screenshot shows the Salesforce interface with the 'Field Properties' dialog box open. The dialog box has a title bar 'Field Properties' and a close button 'x'. Inside, there are two sections: 'Read-Only' and 'Required'. The 'Read-Only' section has a checkbox checked, and the 'Required' section has a checkbox unchecked. Below these sections, there are 'OK' and 'Cancel' buttons. The background shows the 'Membership' section with 'Address Information' and 'Additional Information' tabs. The 'Mailing Address' field is highlighted with a blue background and a red arrow pointing to the 'Field Properties' dialog box. The 'Field Properties' dialog box is also highlighted with a red arrow pointing to the 'Read-Only' checkbox.

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



The screenshot shows the AAKonsult interface with the 'Fields' list on the left and the 'Address Information' section in the main area. A red arrow points from the 'Address Update' field in the 'Fields' list to the 'Mailing Address' field in the 'Address Information' section.

Fields List:

Section	Field Name	Field Type
Section	_SYSTEM: IsIndivi...	Address Update
Blank Space	Account Name	Address Verificat...
_SYSTEM: ACCOUNT ...	Address Id	Alternate Email
_SYSTEM: HOUSEHOL...	Address Override	Assistant

Address Information (Header visible on edit only):

Mailing Address	Other Address
Suite 300, The Landmark @ One Market San Francisco, CA 94105 US	Suite 300, The Landmark @ One Market San Francisco, CA 94105 US

Additional Information (Header visible on edit only):

Languages	Sample Languages	Level	Sample Level

System Information (Header visible on edit only):

Created By	Last Modified By
Sample User	Sample User

Description Information (Header visible on edit only):

Description	Sample Description

Custom Links (Header visible on detail only):

Mobile Cards (Salesforce1 only)

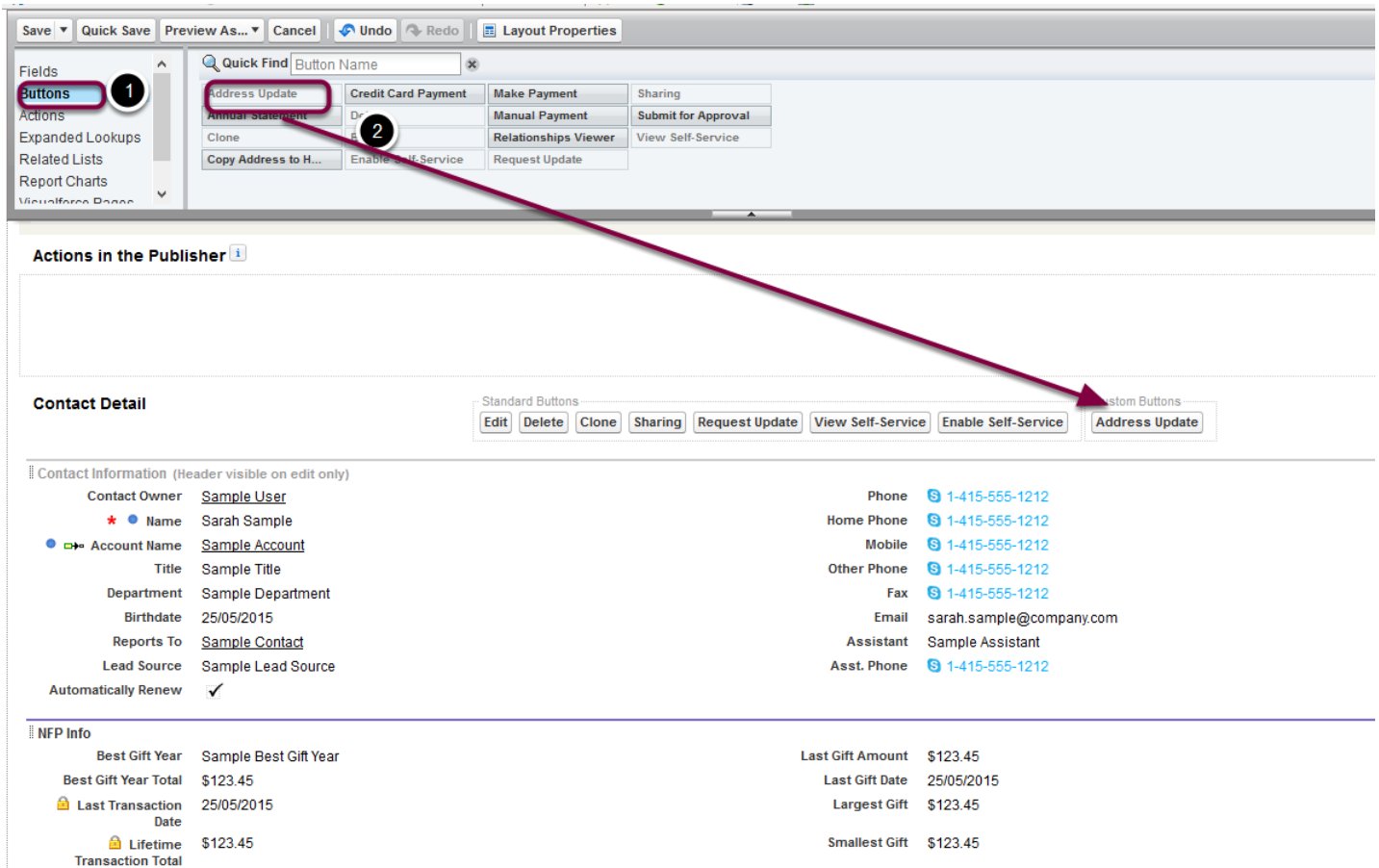
Related Lists:

Opportunities [New](#)

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



The screenshot shows the AAKonsult interface. In the top-left sidebar, the 'Buttons' selection object is highlighted with a red circle and the number 1. In the top-center 'Quick Find' list, the 'Address Update' button is highlighted with a red circle and the number 2. A red arrow points from the 'Address Update' button in the 'Quick Find' list to the 'Custom Buttons' section in the 'Contact Detail' view, where it has been added to the button bar.

Actions in the Publisher

Contact Detail

Standard Buttons: Edit, Delete, Clone, Sharing, Request Update, View Self-Service, Enable Self-Service, Address Update

Custom Buttons: Address Update

Contact Information (Header visible on edit only)

Contact Owner	Sample User	Phone	1-415-555-1212
Name	Sarah Sample	Home Phone	1-415-555-1212
Account Name	Sample Account	Mobile	1-415-555-1212
Title	Sample Title	Other Phone	1-415-555-1212
Department	Sample Department	Fax	1-415-555-1212
Birthdate	25/05/2015	Email	sarah.sample@company.com
Reports To	Sample Contact	Assistant	Sample Assistant
Lead Source	Sample Lead Source	Asst. Phone	1-415-555-1212
Automatically Renew	✓		

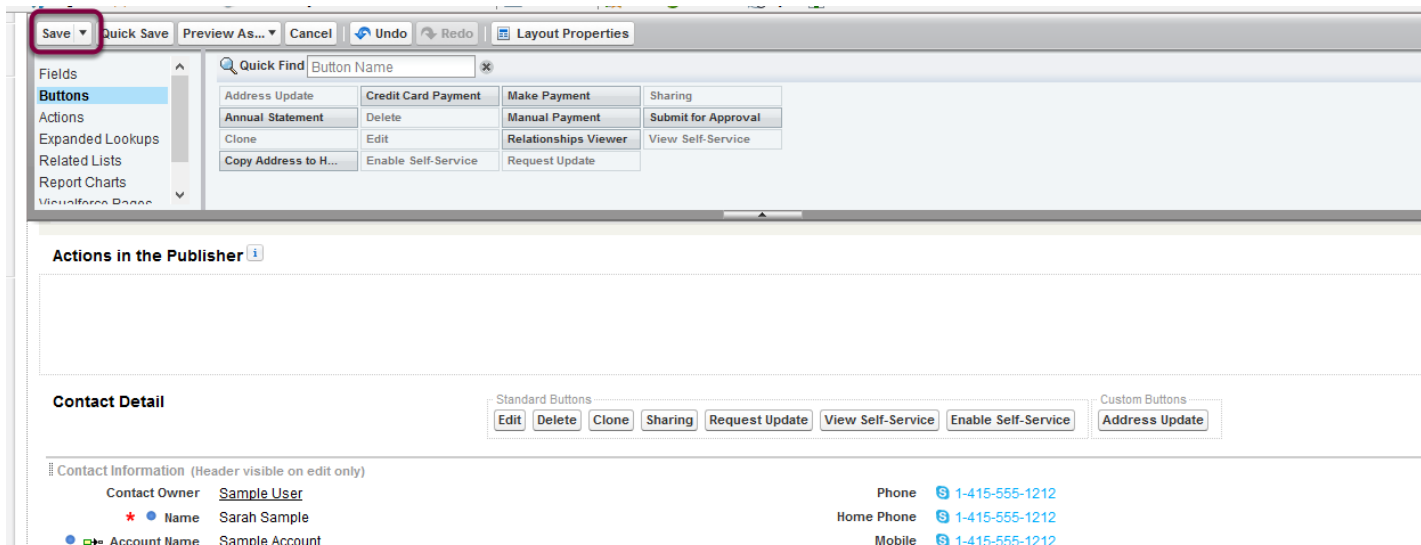
NFP Info

Best Gift Year	Sample Best Gift Year	Last Gift Amount	\$123.45
Best Gift Year Total	\$123.45	Last Gift Date	25/05/2015
Last Transaction Date	25/05/2015	Largest Gift	\$123.45
Lifetime Transaction Total	\$123.45	Smallest Gift	\$123.45

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



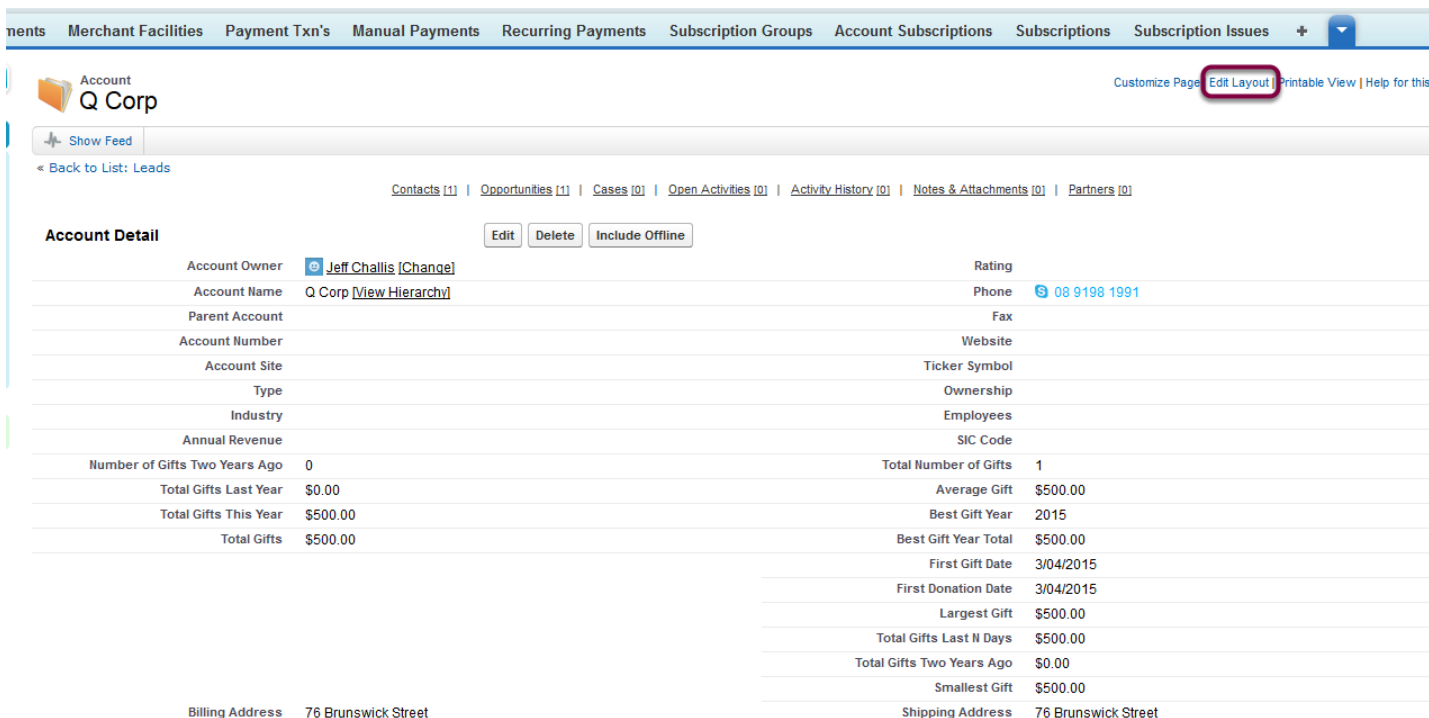
The screenshot shows the AAKonsult interface with the 'Save' button highlighted in the top toolbar. The interface includes a 'Quick Find' search bar, a 'Buttons' sidebar, and a 'Contact Detail' section with various buttons like 'Edit', 'Delete', 'Clone', 'Sharing', 'Request Update', 'View Self-Service', 'Enable Self-Service', and 'Address Update'.

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



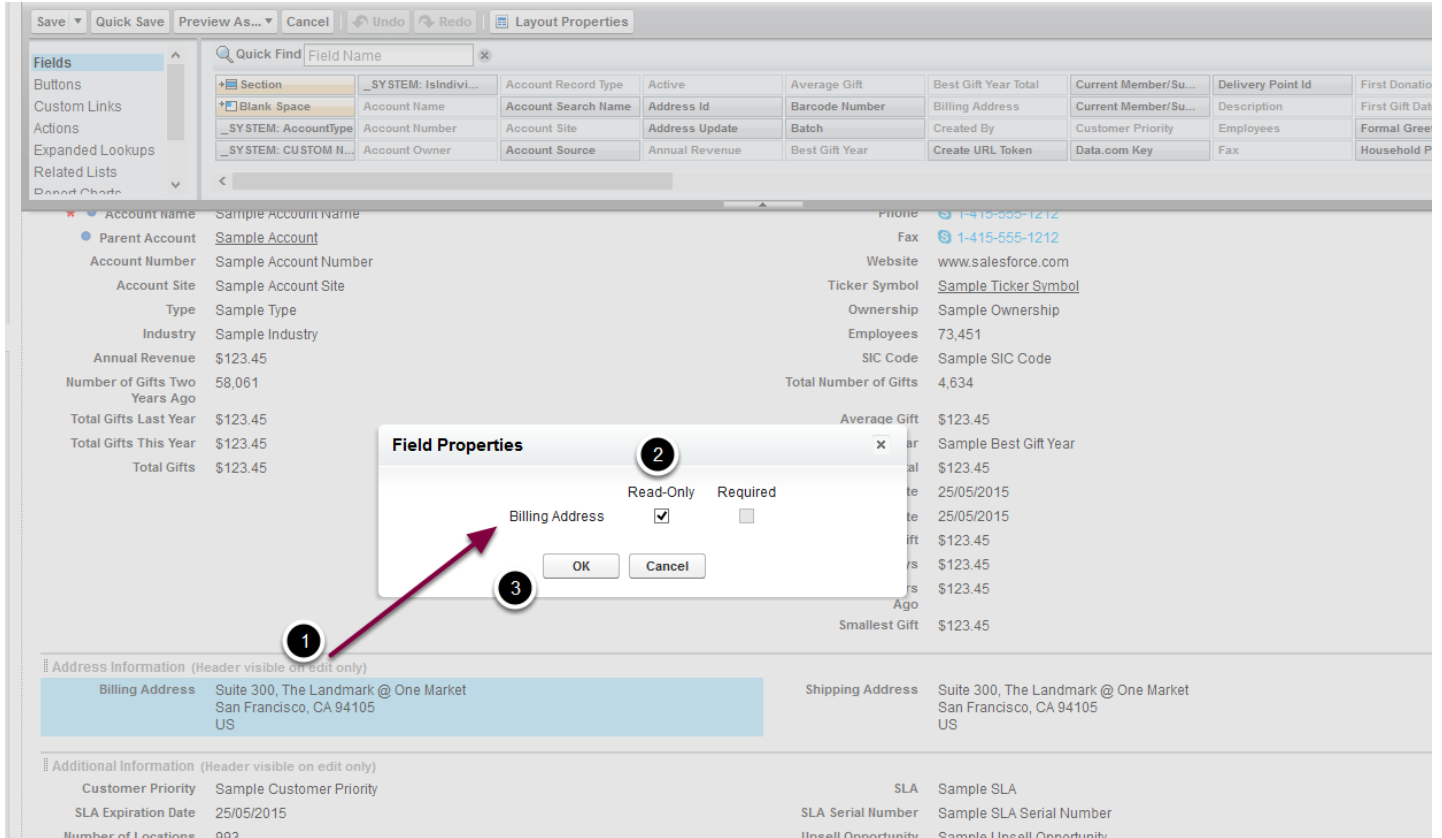
The screenshot shows the AAKonsult interface with the 'Edit Layout' button highlighted in the top toolbar. The interface includes a 'Show Feed' button, a 'Back to List: Leads' link, and a 'Contact Detail' section with various buttons like 'Edit', 'Delete', and 'Include Offline'.

Account Detail		Rating	
Account Owner	Jeff Challis [Change]	Phone	08 9198 1991
Account Name	Q Corp [View Hierarchy]	Fax	
Parent Account		Website	
Account Number		Ticker Symbol	
Account Site		Ownership	
Type		Employees	
Industry		SIC Code	
Annual Revenue		Total Number of Gifts	1
Number of Gifts Two Years Ago	0	Average Gift	\$500.00
Total Gifts Last Year	\$0.00	Best Gift Year	2015
Total Gifts This Year	\$500.00	Best Gift Year Total	\$500.00
Total Gifts	\$500.00	First Gift Date	3/04/2015
		First Donation Date	3/04/2015
		Largest Gift	\$500.00
		Total Gifts Last N Days	\$500.00
		Total Gifts Two Years Ago	\$0.00
		Smallest Gift	\$500.00
Billing Address	76 Brunswick Street	Shipping Address	76 Brunswick Street

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



The screenshot shows the Salesforce Account record page. A 'Field Properties' dialog box is open for the 'Billing Address' field. The dialog has two tabs: 'Read-Only' (selected) and 'Required'. The 'Read-Only' checkbox is checked. The 'Required' checkbox is unchecked. The 'OK' and 'Cancel' buttons are at the bottom. A red arrow points from the 'Billing Address' field in the account record to the dialog box. The account record shows various fields like Account Name, Account Number, Account Site, Type, Industry, Annual Revenue, Number of Gifts, Total Gifts, etc.

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

The screenshot shows the AAkonsult interface with the 'Fields' list on the left and the 'Account Information' section on the right. A red arrow points from the 'Address Update' field in the 'Fields' list to the 'Billing Address' field in the 'Account Information' section.

Fields List:

Field Name	Field Type
Section	_SYSTEM: IsIndivi...
Blank Space	Account Name
_SYSTEM: AccountType	Account Number
_SYSTEM: CUSTOM N...	Account Owner
Account Record Type	Active
Account Search Name	Address Id
Address Id	Barcode Number
Address Update	Batch
Annual Revenue	Best Gift Year
Average Gift	Best Gift Year Total
Best Gift Year	Current Member/Su...
Best Gift Year Total	Created By
Current Member/Su...	Customer Priority
Delivery Point Id	Employees
First Donati	Formal Gre
First Gift D	Household

Account Information (Header visible on edit only)

Billing Address	Suite 300, The Landmark @ One Market San Francisco, CA 94105 US	Shipping Address	Suite 300, The Landmark @ One Market San Francisco, CA 94105 US
------------------------	---	-------------------------	---

Additional Information (Header visible on edit only)

Customer Priority	Sample Customer Priority	SLA	Sample SLA
SLA Expiration Date	25/05/2015	SLA Serial Number	Sample SLA Serial Number
Number of Locations	993	Upsell Opportunity	Sample Upsell Opportunity

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

The screenshot shows the AAKonsult interface. In the top left, there's a sidebar with 'Buttons' selected, indicated by a red circle and the number 1. In the top center, there's a 'Quick Find' search bar with 'Button Name' entered. Below it, a list of buttons is shown, with 'Address Update' highlighted by a red circle and the number 2. A red arrow points from the 'Address Update' button in the list to the 'Custom Buttons' section in the 'Account Detail' area. In the 'Account Detail' area, there are two sections: 'Standard Buttons' and 'Custom Buttons'. The 'Custom Buttons' section contains the 'Address Update' button.

Account Detail

Standard Buttons: Edit, Delete, Sharing, Include Offline

Custom Buttons: Address Update

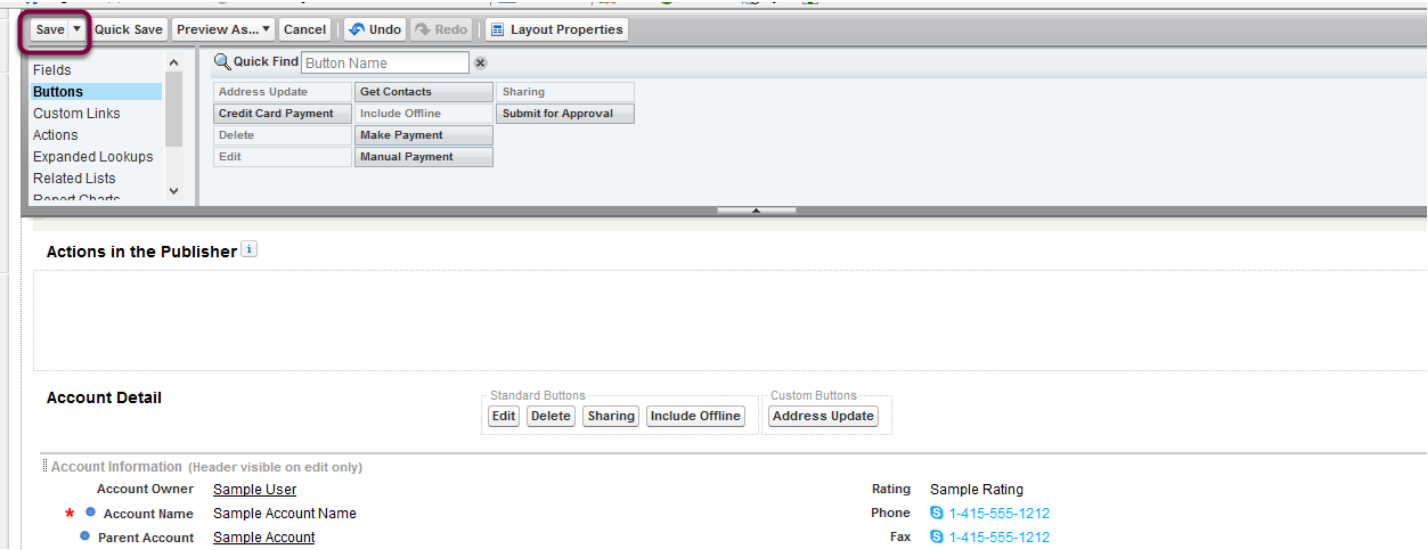
Account Information (Header visible on edit only)

Account Owner	Sample User	Rating	Sample Rating
Account Name	Sample Account Name	Phone	1-415-555-1212
Parent Account	Sample Account	Fax	1-415-555-1212
Account Number	Sample Account Number	Website	www.salesforce.com
Account Site	Sample Account Site	Ticker Symbol	Sample Ticker Symbol
Type	Sample Type	Ownership	Sample Ownership
Industry	Sample Industry	Employees	73,451
Annual Revenue	\$123.45	SIC Code	Sample SIC Code
Number of Gifts Two Years Ago	58,061	Total Number of Gifts	4,634
Total Gifts Last Year	\$123.45	Average Gift	\$123.45
Total Gifts This Year	\$123.45	Best Gift Year	Sample Best Gift Year
Total Gifts	\$123.45	Best Gift Year Total	\$123.45
		First Gift Date	25/05/2015
		First Donation Date	25/05/2015
		Largest Gift	\$123.45

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

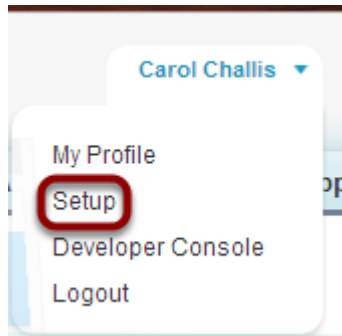
You'll need to repeat this process for other layouts should they exist

Customisation - Optional

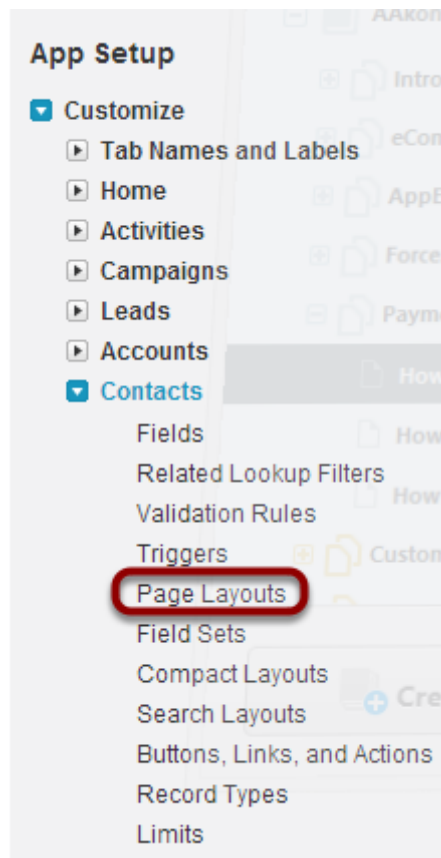
How to adjust the Contacts Page layout

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

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



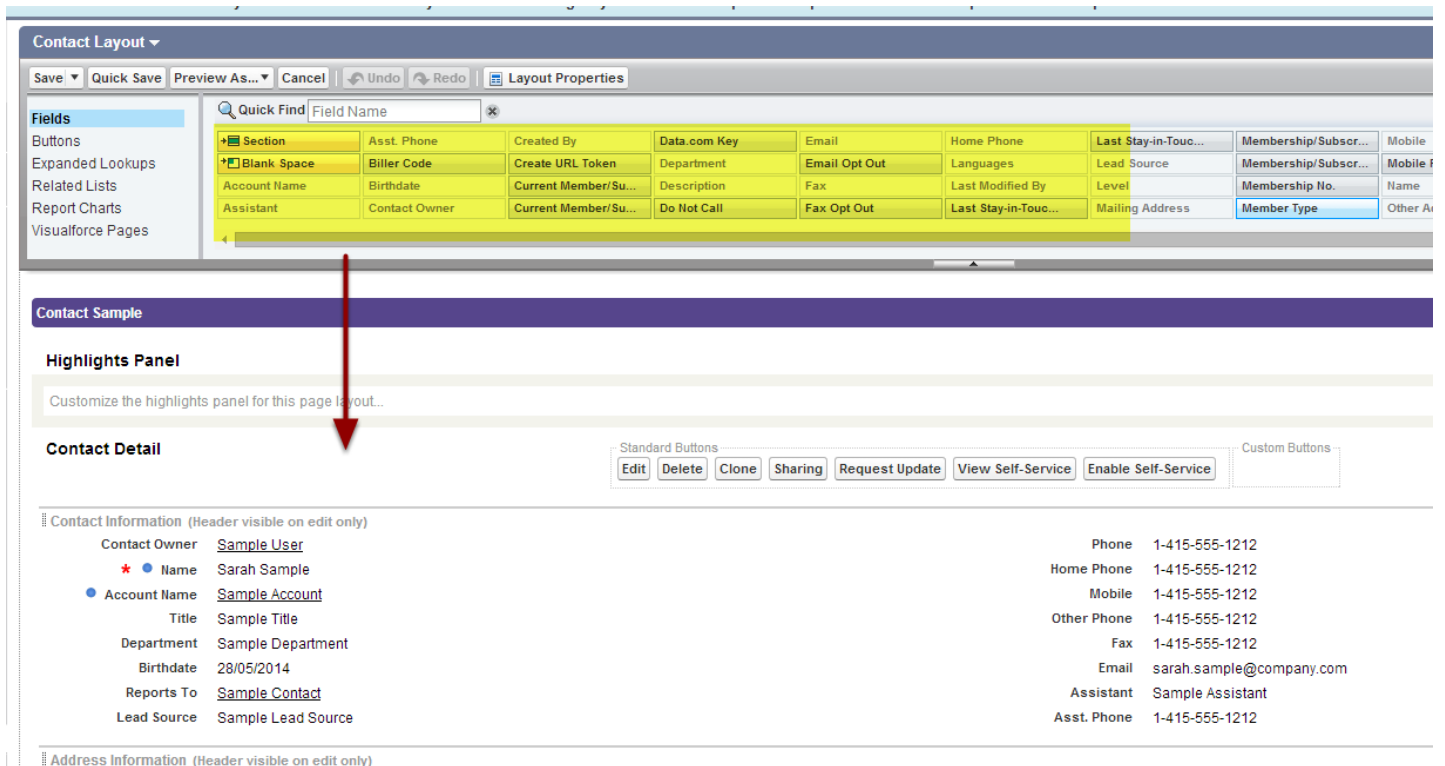
1.1 Select App Setup > Customise > Contacts > Page Layouts



2. Select 'Edit' on 'Contact layout'

Contact Page Layouts	
Action	Page Layout Name
Edit Del	Contact (Marketing) Layout
Edit Del	Contact (Sales) Layout
Edit Del	Contact (Support) Layout
Edit Del	Contact Layout

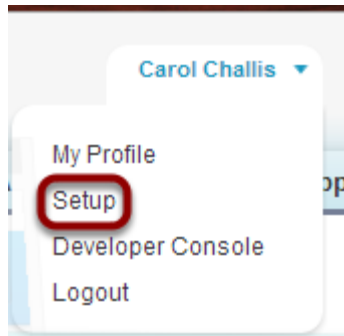
3. Drop and drag a field button onto the Contact Detail page



The screenshot shows the 'Contact Layout' editor interface. At the top, there's a 'Contact Layout' dropdown and a toolbar with 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. Below this is a 'Fields' sidebar on the left and a 'Quick Find' search bar. The main area displays a grid of fields including 'Section', 'Asst. Phone', 'Created By', 'Data.com Key', 'Email', 'Home Phone', 'Last Stay-in-Touch...', 'Membership/Subscr...', and 'Mobile'. A red arrow points from the 'Blank Space' field in the grid to the 'Contact Detail' section below. The 'Contact Detail' section includes a 'Highlights Panel' with a text input 'Customize the highlights panel for this page layout...', a 'Contact Detail' header, and a 'Standard Buttons' bar with buttons like 'Edit', 'Delete', 'Clone', 'Sharing', 'Request Update', 'View Self-Service', and 'Enable Self-Service'. Below the buttons, there are two sections: 'Contact Information (Header visible on edit only)' and 'Address Information (Header visible on edit only)'. The 'Contact Information' section contains fields like 'Contact Owner', 'Name', 'Account Name', 'Title', 'Department', 'Birthdate', 'Reports To', and 'Lead Source'. The 'Address Information' section contains fields like 'Phone', 'Home Phone', 'Mobile', 'Other Phone', 'Fax', 'Email', 'Assistant', and 'Asst. Phone'.

How to adjust the Accounts Page layout

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



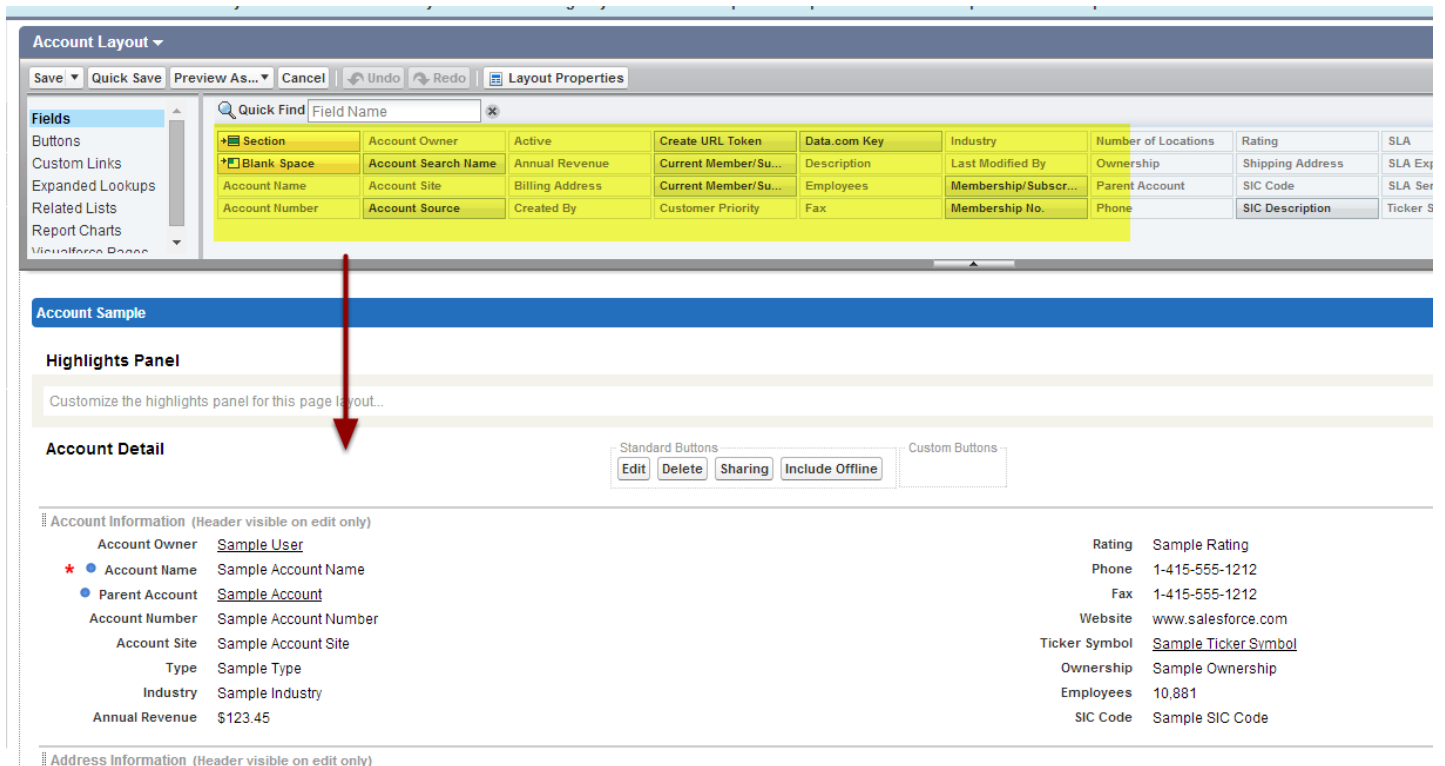
1.1 Select App Setup > Customise > Accounts > Page Layouts



2. Select 'Edit' on 'Account Layout'

Account Page Layouts	
Action	Page Layout Name
Edit Del	Account (Marketing) Layout
Edit Del	Account (Sales) Layout
Edit Del	Account (Support) Layout
Edit Del	Account Layout

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



The screenshot shows the 'Account Layout' editor. At the top, there's a 'Fields' list on the left and a 'Quick Find' search bar. Below the search bar is a table of available fields. A red arrow points from the 'Account Number' field in the table to the 'Account Detail' section of the page layout below.

Section	Account Owner	Active	Create URL Token	Data.com Key	Industry	Number of Locations	Rating	SLA
Blank Space	Account Search Name	Annual Revenue	Current Member/Su...	Description	Last Modified By	Ownership	Shipping Address	SLA Ex
Account Name	Account Site	Billing Address	Current Member/Su...	Employees	Membership/Subscr...	Parent Account	SIC Code	SLA Ser
Account Number	Account Source	Created By	Customer Priority	Fax	Membership No.	Phone	SIC Description	Ticker S

Account Sample

Highlights Panel

Customize the highlights panel for this page layout...

Account Detail

Standard Buttons: [Edit](#) [Delete](#) [Sharing](#) [Include Offline](#)

Custom Buttons:

Account Information (Header visible on edit only)

Account Owner	Sample User	Rating	Sample Rating
Account Name	Sample Account Name	Phone	1-415-555-1212
Parent Account	Sample Account	Fax	1-415-555-1212
Account Number	Sample Account Number	Website	www.salesforce.com
Account Site	Sample Account Site	Ticker Symbol	Sample Ticker Symbol
Type	Sample Type	Ownership	Sample Ownership
Industry	Sample Industry	Employees	10,881
Annual Revenue	\$123.45	SIC Code	Sample SIC Code

Address Information (Header visible on edit only)

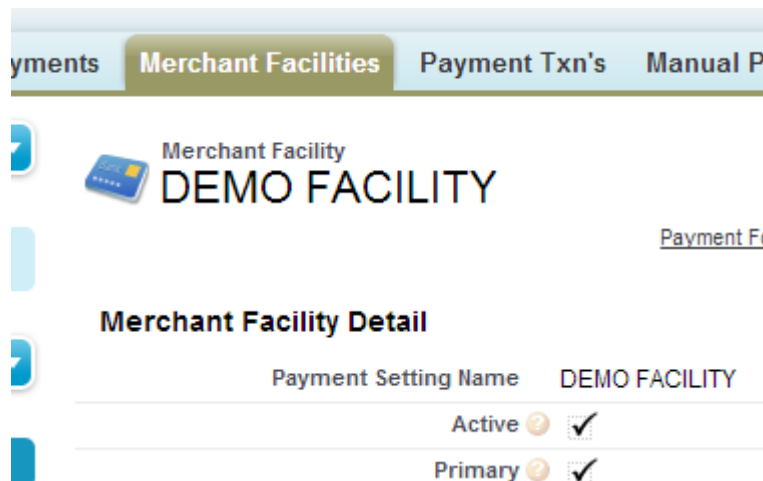
How to adjust settings for the Not-for-profit Starter Pack

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

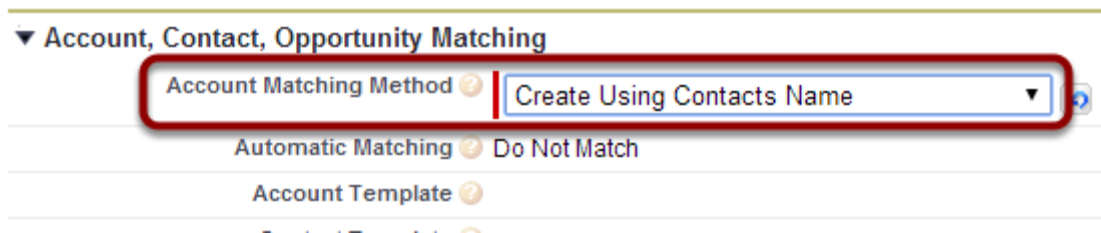
1.1 Navigate to the Merchant Facility tab



1.2 Scroll down to Account, Contact, Opportunity Matching heading



1.3 Double click into the Account Matching Method field



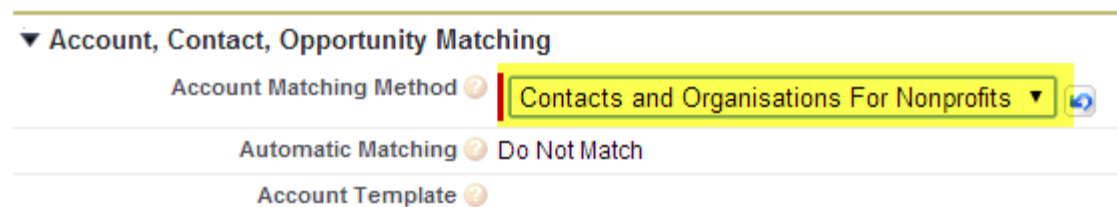
▼ Account, Contact, Opportunity Matching

Account Matching Method ? Create Using Contacts Name ▼

Automatic Matching ? Do Not Match

Account Template ?

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



▼ Account, Contact, Opportunity Matching

Account Matching Method ? Contacts and Organisations For Nonprofits ▼

Automatic Matching ? Do Not Match

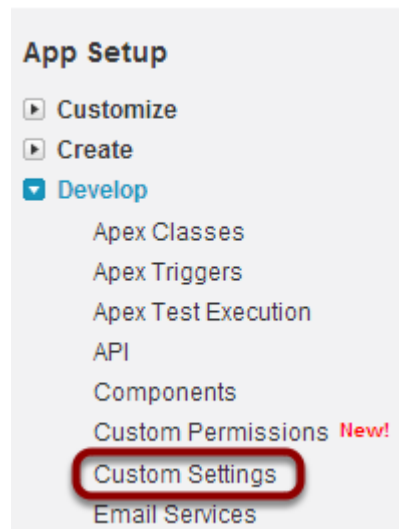
Account Template ?

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.

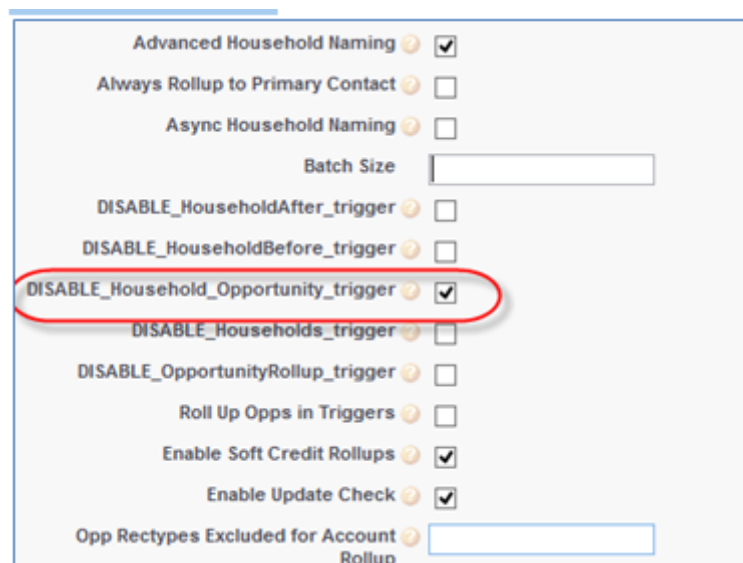
If you are using versino 3 of the NPSP or later then you do NOT need to disable this trigger.

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

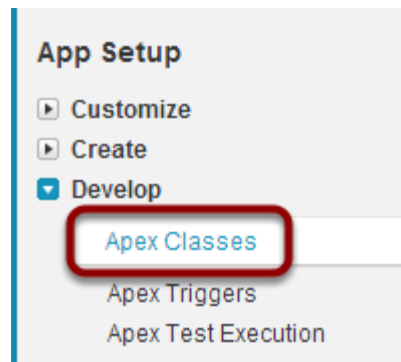


3. Schedule Roll-up processor to automatic

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.

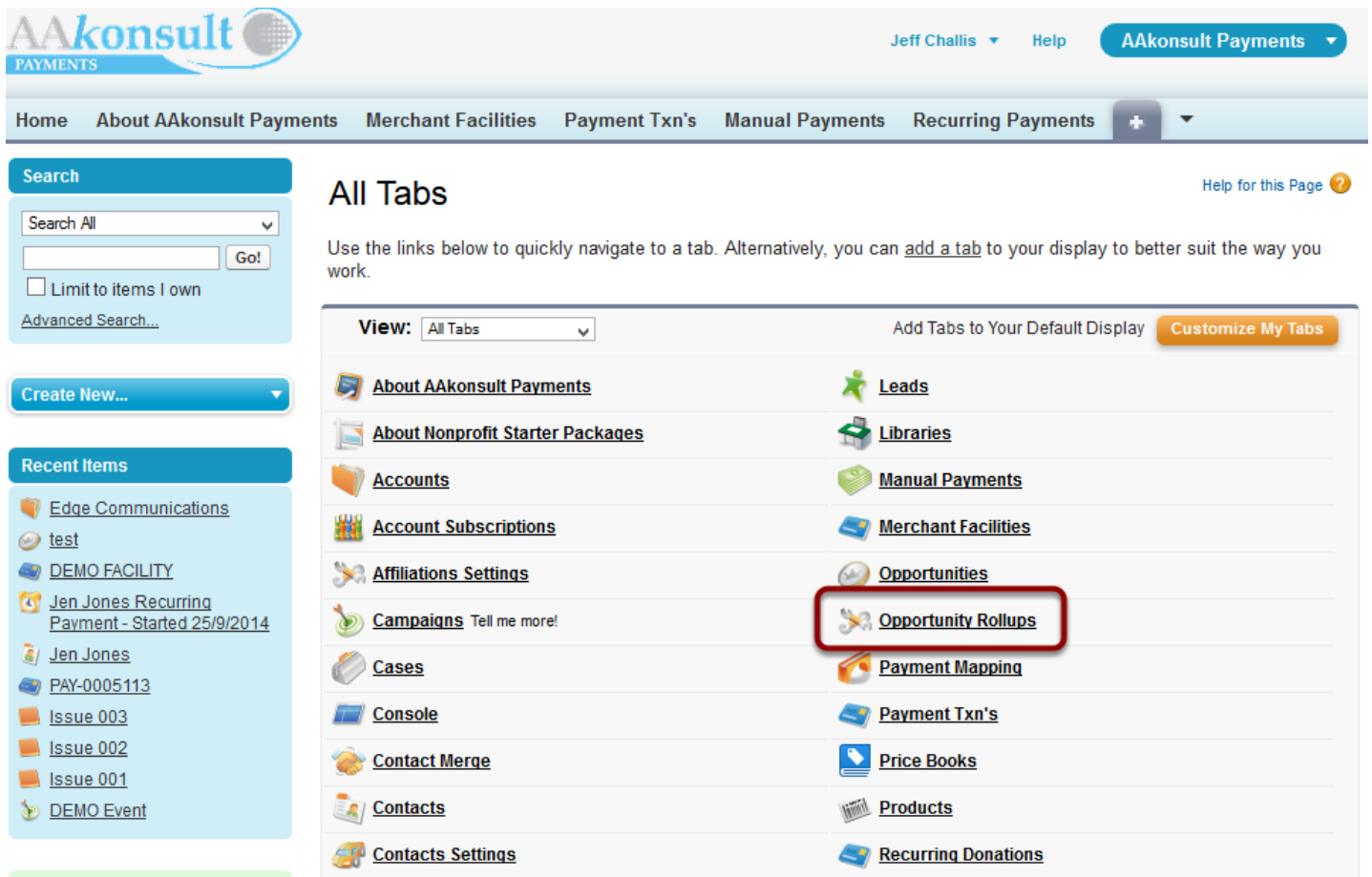
The below steps enable the scheduling of the roll-ups so totals on Accounts and Contacts get re-calculated daily.

3.1 Navigate to Opportunity Roll-ups Tab



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

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

A screenshot of the Salesforce 'All Tabs' page. The page header shows the AAkonsult logo, user 'Jeff Challis', and a 'Help' link. The main navigation bar includes links like 'Home', 'About AAkonsult Payments', 'Merchant Facilities', 'Payment Txn's', 'Manual Payments', and 'Recurring Payments'. On the left, there's a 'Search' box and a 'Recent Items' list. The main content area is titled 'All Tabs' and contains a grid of tabs. The 'Opportunity Rollups' tab is highlighted with a red rectangle. Other tabs include 'About AAkonsult Payments', 'Leads', 'About Nonprofit Starter Packages', 'Libraries', 'Accounts', 'Manual Payments', 'Account Subscriptions', 'Merchant Facilities', 'Affiliations Settings', 'Opportunities', 'Campaigns', 'Payment Mapping', 'Cases', 'Payment Txn's', 'Console', 'Price Books', 'Contact Merge', 'Products', 'Contacts', and 'Recurring Donations'. A 'Customize My Tabs' button is in the top right of the tabs area.

3.3 Select Apex Class 'SCHED_OppRollup'



Batch Opportunity Rollup

Use this page to roll up totals for all closed opportunities, saving the results in contact, household, and organization records. The process may take some time; you can close this page and the process will continue in the background.

Batch Rollup Progress

Apex Class	Created Date	Created By	Status	Completion Date
BATCH_OppRollup	18/10/2014 2:25 PM	Jeff Challis	Queued	0%
BATCH_OppRollup	18/10/2014 2:25 PM	Jeff Challis	Queued	0%
BATCH_OppRollup	18/10/2014 2:25 PM	Jeff Challis	Queued	0%
BATCH_OppRollup	18/10/2014 2:25 PM	Jeff Challis	Queued	0%

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

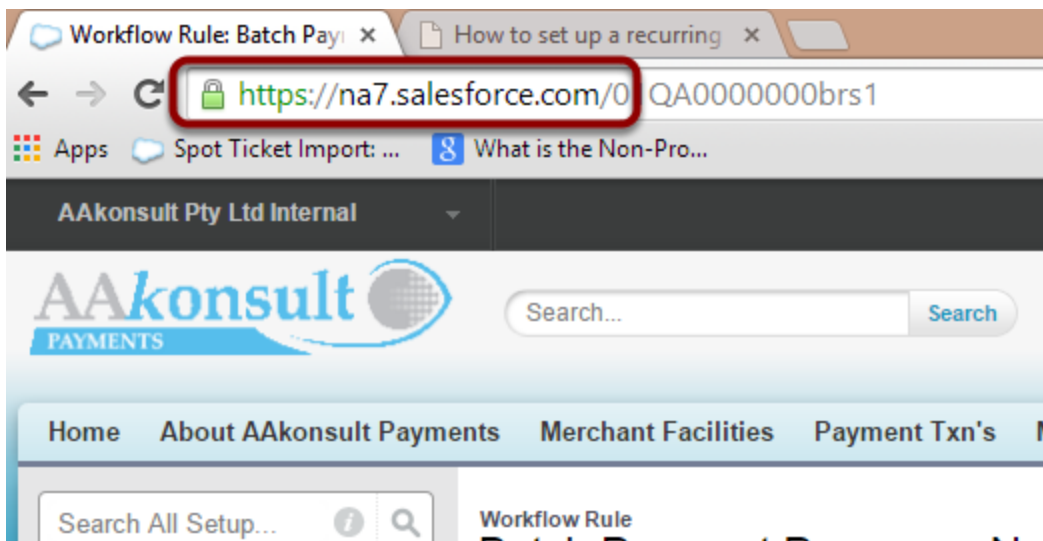
How to setup Annual Statements

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

ents Merchant Facilities Payment Txn's Manual Payments Recurring Payments Subscription Groups Account S

Remote Site Edit

Enter the URL for the remote site. All s-controls, JavaScript OnClick commands in custom buttons, Apex, and AJAX proxy calls can ac

Remote Site Edit

Save

Save & New

Cancel

Remote Site Name

Salesforce

Remote Site URL

https://na7.salesforce.com/

Disable Protocol Security

☐ i

Description

Active

☒

Save

Save & New

Cancel

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](#)

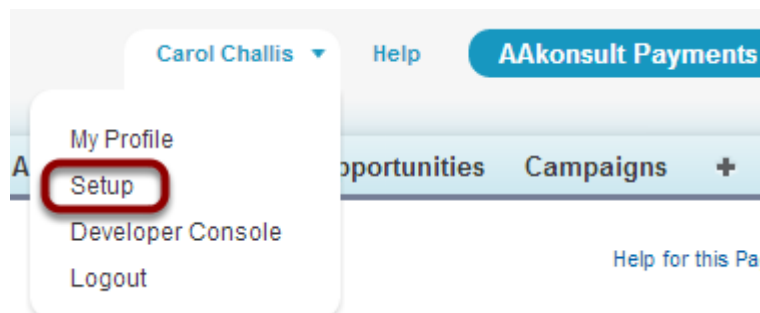
How to send out first automated reminders - contact level

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

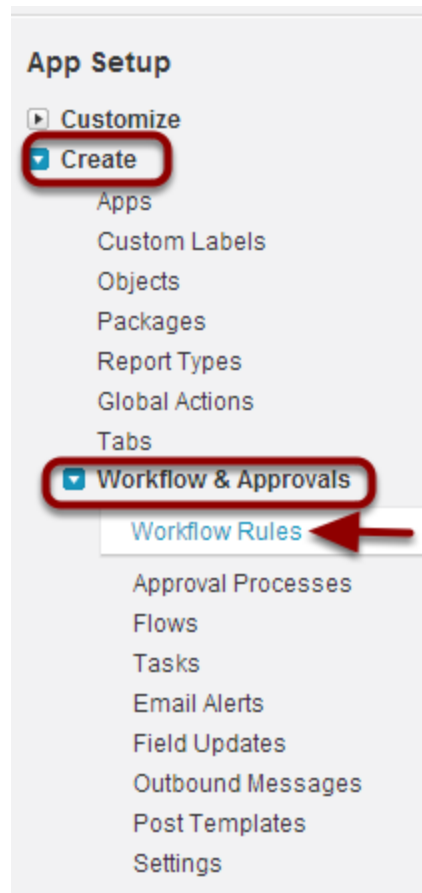
Quick Steps:

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]'

Configure your organization's workflow by creating workflow rules. 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 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

View: All Workflow Rules ▼ [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O |

New Rule		
Action	Rule Name ↑	Description
Edit Activate	 1st Account Subscription Renewal Reminder [ADD TIME BASED WORKFLOW]	Email Account Subscription Contact a reminder that their su UPDATE: Add timebase workflow, 30 days before subscription end da - Email Alert: send 1st Account Subs Renewal Reminder Er - Field Update: set 2nd Reminder Due
Edit Activate	 1st Renewal Reminder [ADD TIME BASED WORKFLOW]	Email Contact a reminder that their subscription is now due UPDATE: Add timebase workflow, 30 days before subscription end da - Email Alert: send 1st Renewal Reminder Email - Field Update: set 2nd Reminder Due Keep in mind Automatic Renewals
Edit Activate	 2nd Account Subscription Renewal Reminder [ADD TIME BASED WORKFLOW]	Email Account Subscription Contact a reminder that their su UPDATE: Add Time Based Workflow, 10 days after Subscription End I - Email Alert: send 2nd Account Subscription Renewal Rem Note: Automatic Renewals Email Contact a reminder that their subscription is now due


Open the circled rule

4. Select 'Clone'

Workflow Rule

1st Renewal Reminder [ADD TIME BASED WORKFLOW] (Managed)

« [Back to List: Workflow Rules](#)

 This Workflow Rule is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Workflow Rule Detail

Clone

Activate

Rule Name	1st Renewal Reminder [ADD TIME BASED WORKFLOW]	Object	Subscription
Namespace Prefix	AAkPay	Evaluation Criteria	Evaluate the rule when a time it's edited to subseq
Installed Package	AAkPayments		
Active	<input type="checkbox"/>		
Description	<p>Email Contact a reminder that their subscription is now due.</p> <p>UPDATE:</p> <p>Add timebase workflow, 30 days before subscription end date</p> <ul style="list-style-type: none"> - Email Alert: send 1st Renewal Reminder Email - Field Update: set 2nd Reminder Due 		

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

Edit Rule 1st Renewal Reminder [ADD TIME BASED WORKFLOW]

[Help for this Page](#) 

Step 2: Configure Workflow Rule

2

Step 2 of 3


[Previous](#)

[Save & Next](#)

[Cancel](#)

Enter the name, description, and criteria to trigger your workflow rule. In the next step, associate workflow actions with this workflow rule.

Edit Rule

 = Required Information

1

Object Subscription

Rule Name **1st Renewal Reminder**

Description

2 remaining

Email Contact a reminder that their subscription is now due.

5. Select the 'Add Workflow Action'

The screenshot shows the 'Edit Rule 1st Renewal Reminder' interface. The page is titled 'Edit Rule 1st Renewal Reminder' and includes a 'Help for this Page' link. The current step is 'Step 3: Specify Workflow Actions', which is the final step of 3. A 'Done' button is visible in the top right corner of the step header.

Below the header, there is a section for specifying workflow actions. It includes a 'Rule Criteria' field with the text '(Subscription: Renewal Reminder EQUALS 1st Reminder,Set Reminder) AND (Subscription: Membership Status NOT EQUAL TO Cancelled)' and an 'Evaluation Criteria' field with the text 'Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria'. A 'See an example' link is provided.

The 'Immediate Workflow Actions' section is currently empty, displaying the message 'No workflow actions have been added.' Below this, there is a dropdown menu labeled 'Add Workflow Action'. The dropdown menu is open, showing the following options: 'New Task', 'New Email Alert', 'New Field Update', 'New Outbound Message', 'Select Existing Action' (highlighted in yellow), and 'Add Time Trigger'.

A yellow warning message is displayed at the bottom of the 'Immediate Workflow Actions' section: 'No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.'

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

5.1 Add existing field update - Set First Reminder Due

Select Existing Actions

[Help for this Page](#)

Save Cancel

Choose Action Type 1 Search: Field Update for: Find

2 Available Actions

Field Update: set 2nd Reminder Due

3 Selected Actions

Field Update: set 1st Reminder Due

Add
Remove

Save Cancel

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

Edit Rule 1st Renewal Reminder

[Help for this Page](#)

Step 3: Specify Workflow Actions

Step 3 of 3

Done

 Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria (Subscription: Renewal Reminder EQUALS 1st Reminder,Set Reminder) AND (Subscription: Membership Status NOT EQUAL TO Cancelled)

Evaluation Criteria Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Immediate Workflow Actions

Action	Type	Description
Edit Remove	Field Update	set 1st Reminder Due

Add Workflow Action ▼

Time-Dependent Workflow Actions [See an example](#)

i No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

Add Time Trigger

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

Add Time Trigger Subscription

Workflow Time Trigger Edit

Workflow Rule 1st Renewal Reminder

30

Days ▼

Before ▼

Subscription: End Date ▼

Save

Cancel

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.

Edit Rule 1st Renewal Reminder

Step 3: Specify Workflow Actions

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria	(Subscription: Renewal Reminder EQUALS 1stReminder,Set Reminder) AND (Subscription Status NOT EQUAL TO Cancelled)
Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Immediate Workflow Actions

No workflow actions have been added.

Add Workflow Action ▼

Time-Dependent Workflow Actions

[See an example](#)



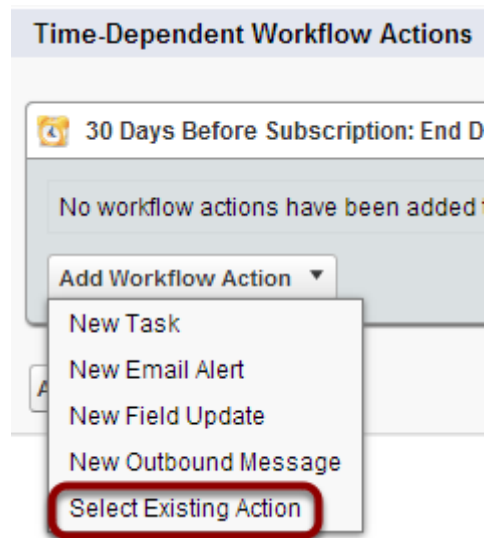
30 Days Before Subscription: End Date [Edit](#) | [Delete](#)

No workflow actions have been added to this time trigger.

Add Workflow Action ▼

Add Time Trigger

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



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

Select Existing Actions

[Help for this Page](#)

The screenshot shows a "Select Existing Actions" dialog box. At the top, there are "Save" and "Cancel" buttons. Below them, a "Choose Action Type" dropdown menu is set to "Email Alert" (highlighted with a red rectangle). To the right of this is a search field with the text "Search: Email Alert" and a "Find" button. Below the search field, there are two lists: "Available Actions" and "Selected Actions". The "Available Actions" list contains three items: "Email Alert: Send Membership Confirmation Email sent after a membership has been approved", "Email Alert: send 1st Renewal Reminder Email", and "Email Alert: send 2nd Renewal Reminder Email". The "Selected Actions" list is empty and shows "--None--". Between the two lists are "Add" and "Remove" buttons. At the bottom of the dialog box, there are "Save" and "Cancel" buttons.

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

Select Existing Actions

[Help for this Page](#)

Save Cancel

Choose Action Type Search: Email Alert for: Find

Available Actions

- Email Alert: Send Membership Confirmation Email sent after a membership has been approved
- Email Alert: send 2nd Renewal Reminder Email

Selected Actions

- Email Alert: send 1st Renewal Reminder Email

1 Add Remove

2 Save Cancel

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

Edit Rule 1st Renewal Reminder

Step 3: Specify Workflow Actions

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria (Subscription: Renewal Reminder EQUALS 1st Reminder,Set Remi
EQUAL TO Cancelled)
Evaluation Criteria Evaluate the rule when a record is created, and any time it's edited to subsequ

Immediate Workflow Actions

No workflow actions have been added.

Add Workflow Action ▼

Time-Dependent Workflow Actions [See an example](#)

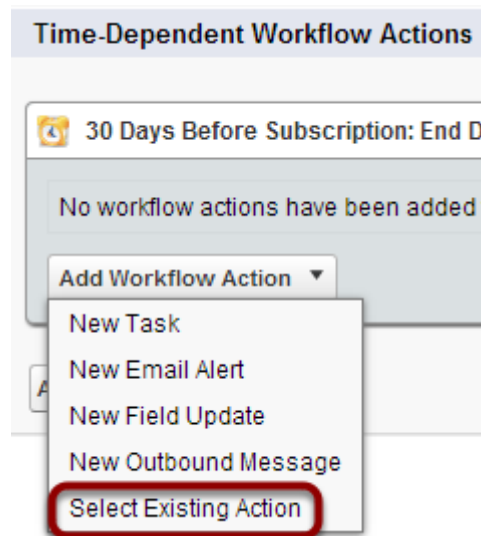
 30 Days Before Subscription: End Date [Edit](#) | [Delete](#)

Action	Type	Description
Edit Remove	Email Alert	send 1st Renewal Reminder Email

Add Workflow Action ▼

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

Select Existing Actions

[Help for this Page ?](#)

The screenshot shows a dialog box titled "Select Existing Actions". At the top, there are "Save" and "Cancel" buttons. Below them is a "Choose Action Type" dropdown menu set to "Field Update", which is highlighted with a red rectangle. To the right of the dropdown is a "Search:" field containing "Field Update" and a "Find" button. The main area is divided into two columns: "Available Actions" and "Selected Actions". The "Available Actions" list contains two items: "Field Update: set 1st Reminder Due" (highlighted) and "Field Update: set 2nd Reminder Due". The "Selected Actions" list contains one item: "Email Alert: send 1st Renewal Reminder Email". Between the two lists are "Add" and "Remove" buttons. At the bottom, there are "Save" and "Cancel" buttons.

8.3 Select Field Update: Set 2nd Reminder Due

Select Existing Actions

[Help for this Page](#)

The screenshot shows a dialog box titled "Select Existing Actions" with a light gray background. At the top, there are "Save" and "Cancel" buttons. Below them, a section labeled "Choose Action Type" contains a search bar with "Field Update" entered, a dropdown arrow, and a "Find" button. The main area is divided into two columns: "Available Actions" on the left and "Selected Actions" on the right. In the "Available Actions" list, "Field Update: set 1st Reminder Due" is selected and highlighted in blue. A red arrow points from this item to the "Selected Actions" list, which already contains "Field Update: set 2nd Reminder Due". Between the two lists are "Add" and "Remove" buttons, each with a right and left arrow respectively. The "Add" button is highlighted with a red square. At the bottom of the dialog, there are "Save" and "Cancel" buttons. Three numbered callouts are present: "1" points to the "Add" button, "2" points to the "Available Actions" list, and "3" points to the "Selected Actions" list.

Save Cancel

Choose Action Type Search: Field Update for: Find

Available Actions Selected Actions

Field Update: set 1st Reminder Due Field Update: set 2nd Reminder Due

Add Remove

Save Cancel

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

Edit Rule 1st Renewal Reminder

[Help for this Page](#) ?

Step 3: Specify Workflow Actions

Step 3 of 3

Done

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria (Subscription: Renewal Reminder EQUALS 1st Reminder,Set Reminder) AND (Subscription: Membership Status NOT EQUAL TO Cancelled)
Evaluation Criteria Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Immediate Workflow Actions

No workflow actions have been added.

Add Workflow Action

New Task

New Email Alert

New Field Update

New Outbound Message

Select Existing Action

Workflow Actions

Subscription: End Date

Edit | Delete

Type	Description
Email Alert	send 1st Renewal Reminder Email
Field Update	set 1st Reminder Due

Add Workflow Action

Add Time Trigger

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

9.1 Select Field Update

Select Existing Actions

Save Cancel

Choose Action Type Search: **Field Update** for: Find

Available Actions

- Field Update: set 1st Reminder Due
- Field Update: set 2nd Reminder Due

Selected Actions

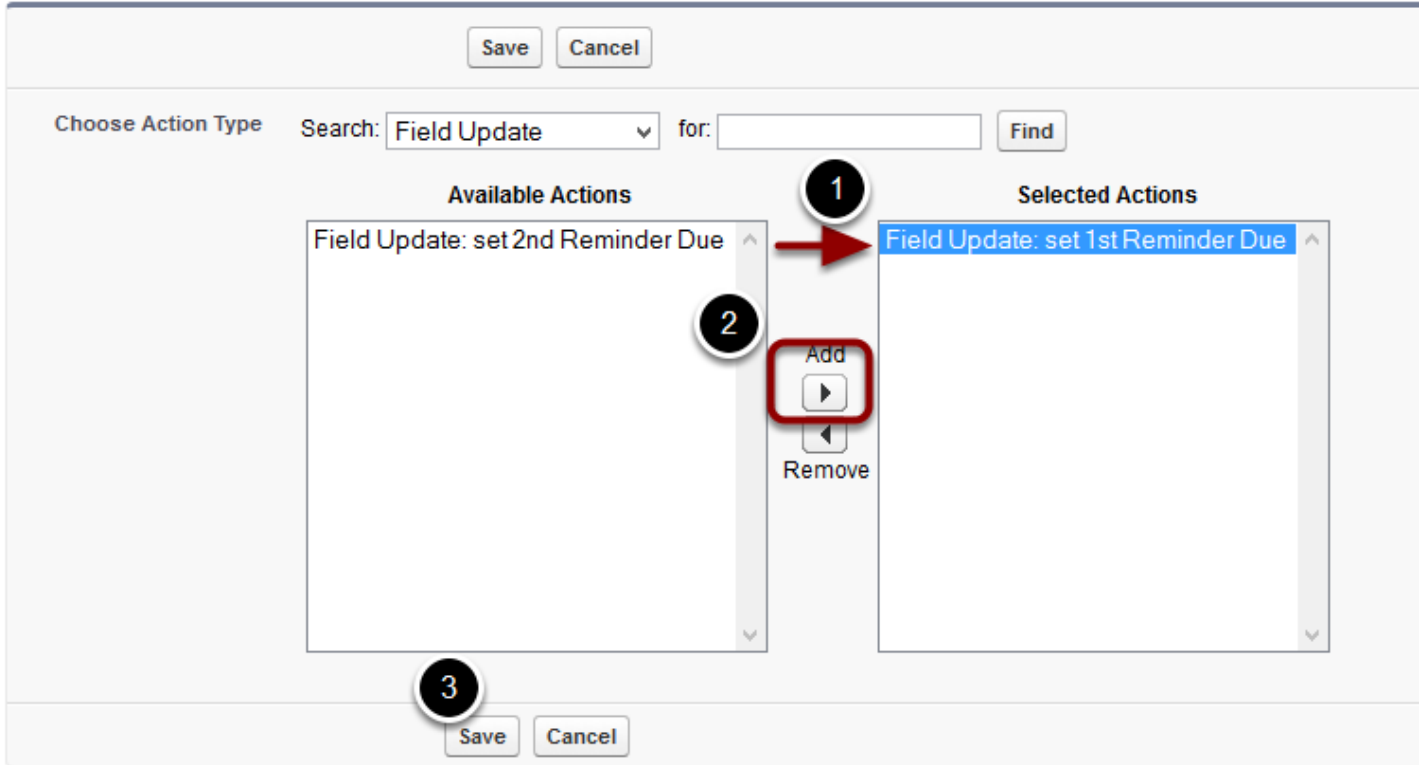
- None--

Add
Remove

Save Cancel

9.2 Select Field Update: Set 1st Reminder Due

Select Existing Actions

[Help for this Page](#)


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

Edit Rule 1st Renewal Reminder

[Help for this Page](#)

Step 3: Specify Workflow Actions		Step 3 of 3
		<div>Done</div>
Specify the workflow actions that will be triggered when the rule criteria are met. See an example		
Rule Criteria	(Subscription: Renewal Reminder EQUALS 1stReminder,Set Reminder) AND (Subscription: Membership Status NOT EQUAL TO Cancelled)	
Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria	

10.1 Select 'Activate' to begin the workflow process

Workflow Rule

1st Renewal Reminder

[« Back to List: Workflow Rules](#)

Workflow Rule Detail

[Edit](#)
[Delete](#)
[Clone](#)
[Activate](#)

Rule Name	1st Renewal Reminder	Object	Subscription
Active	<input type="checkbox"/>	Evaluation Criteria	Evaluate the rule it's edited to sub:
Description	Email Contact a reminder that their subscription is now due. UPDATE: Add timebase workflow 30 days before subscription end date		

10.2 Set 'Default Workflow User' and Save

Workflow & Approvals Settings

[Help for this Page ?](#)


SaveCancel

Specify a default workflow user. Salesforce.com recommends choosing a user with system administrator privileges.

Default Workflow User

Enabling email approval response lets users reply to email approval requests by typing APPROVE or REJECT in the first line and adding comments in the second line.

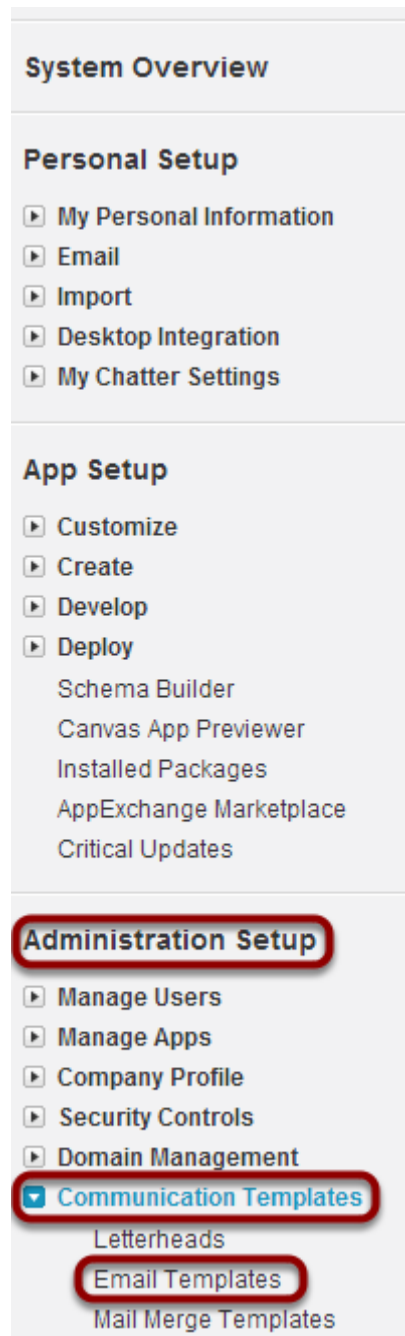
Enable Email Approval Response ☐


 By enabling the email approval response feature, you agree to allow salesforce.com to process email approval responses, update approval requests for all active users in your organization, and update the approval object on behalf of your organization's users.

SaveCancel

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

AAkonsult Payments

Below is a list of all your email templates in the folder selected. Click the new icon to create new email templates when sending single emails. For mass emails, only text, HTML and Visualforce are supported.

Folder AAkonsult Payments ▼ [Edit](#) | [Create New Folder](#)

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

Edit Del		Large Payment/Donation Notification	Text	<input checked="" type="checkbox"/>
Edit Del		Matching Reminder	Text	<input checked="" type="checkbox"/>
Edit Del		Membership Confirmation	Visualforce	<input checked="" type="checkbox"/>
Edit Del		New Direct Debit	Text	<input checked="" type="checkbox"/>
Edit Del		New Online Membership Payment Notification	Visualforce	<input checked="" type="checkbox"/>
Edit Del		New Online Payment Notification	Text	<input checked="" type="checkbox"/>
Edit Del		Pay Later Instructions	Text	<input checked="" type="checkbox"/>
Edit Del		Payment Receipt	Visualforce	<input checked="" type="checkbox"/>
Edit Del		Payment Schedule Invoice	Visualforce	<input checked="" type="checkbox"/>
Edit Del		Recurring Payment Card Expiry	Text	<input checked="" type="checkbox"/>
Edit Del		Recurring Payment Failure	Text	<input checked="" type="checkbox"/>
Edit Del		Recurring Payment Schedule Not Restarted	Text	<input checked="" type="checkbox"/>
Edit Del		Renewal - 1st Account Reminder	Text	<input checked="" type="checkbox"/>
Edit Del		Renewal - 1st Account Reminder w/ PDF	Visualforce	<input checked="" type="checkbox"/>
Edit Del		Renewal - 1st Reminder	Text	<input checked="" type="checkbox"/>
Edit Del		Renewal - 1st Reminder w/ PDF	Visualforce	<input checked="" type="checkbox"/>

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 <input checked="" type="checkbox"/>
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 Challis

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}

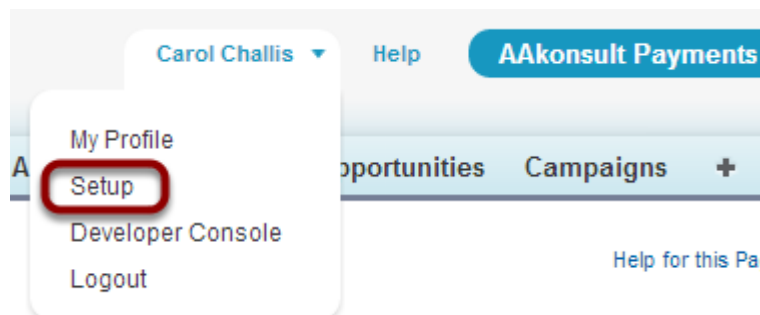
How to send out second automated reminders - contact level

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

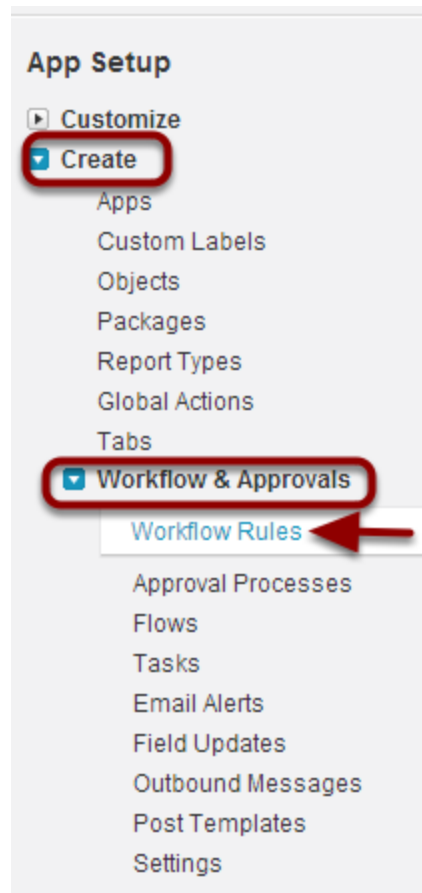
Quick Steps:

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]'

Edit Del Activate	<u>1st Renewal Reminder</u>	<p>UPDATE: Add timebase workflow, 30 days before subscription end - Email Alert: send 1st Renewal Reminder Email - Field Update: set 2nd Reminder Due</p> <p>Keep in mind Automatic Renewals</p>
Edit Activate	 <u>1st Renewal Reminder [ADD TIME BASED WORKFLOW]</u>	<p>Email Contact a reminder that their subscription is now due</p> <p>UPDATE: Add timebase workflow, 30 days before subscription end - Email Alert: send 1st Renewal Reminder Email - Field Update: set 2nd Reminder Due</p> <p>Keep in mind Automatic Renewals</p>
Edit Activate	 <u>2nd Account Subscription Renewal Reminder [ADD TIME BASED WORKFLOW]</u>	<p>Email Account Subscription Contact a reminder that their subscription is now due</p> <p>UPDATE: Add Time Based Workflow, 10 days after Subscription End - Email Alert: send 2nd Account Subscription Renewal Reminder</p> <p>Note: Automatic Renewals</p>
Edit Activate	 <u>2nd Renewal Reminder [ADD TIME BASED WORKFLOW]</u>	<p>Email Contact a reminder that their subscription is now due</p> <p>UPDATE: Add Time Based Workflow, 10 days after Subscription End - Email Alert: send 2nd Renewal Reminder Email</p> <p>Keep in mind Automatic Renewals</p>
Edit Activate	 <u>Account Membership Confirmation</u>	<p>Sends out a confirmation email when a Account members member renews.</p>
Edit Activate	 <u>Batch Payment Processor Not Running [ADD TIME BASED WORKFLOW]</u>	<p>Advise Payment Administrators if a Batch Payment Scheduler fails the last 24 hours. - Add time based action - 1 day aft Last Batch Processor Failure - Send Email: send reminder that Batch Payments Processor is not running</p> <p>Remind Payment Administrators if a Batch Payment Processor fails</p>

Open the circled rule

Select 'Clone'

Workflow Rule

2nd Renewal Reminder [ADD TIME BASED WORKFLOW] (Managed)

« [Back to List: Workflow Rules](#)



This Workflow Rule is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Workflow Rule Detail

[Clone](#)
[Activate](#)

Rule Name	2nd Renewal Reminder [ADD TIME BASED WORKFLOW]	Object	Subscription
Namespace Prefix	AAkPay	Evaluation Criteria	Evaluate the rule if it's edited to subs
Installed Package	AAkPayments		
Active	<input type="checkbox"/>		
Description	<p>Email Contact a reminder that their subscription is now due.</p> <p>UPDATE: Add Time Based Workflow, 10 days after Subscription End Date - Email Alert: send 2nd Renewal Reminder Email</p> <p>Keep in mind Automatic Renewals</p>		
Rule Criteria	(Subscription: Renewal Reminder EQUALS 2nd Reminder) AND (Subscription: Membership		

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

Edit Rule 2nd Renewal Reminder [ADD TIME BASED WORKFLOW]

[Help for this](#)

Step 2: Configure Workflow Rule

2

Step

[Previous](#)
[Save & Next](#)

Enter the name, description, and criteria to trigger your workflow rule. In the next step, associate workflow actions with this workflow rule.

Edit Rule

= Required Info

1

Object

Subscription

Rule Name

2nd Renewal Reminder

Description

39 remaining

Email Contact a reminder that their subscription is now due.

Evaluation Criteria

Select the 'Add Time Trigger' button

Edit Rule 2nd Renewal Reminder

Step 3: Specify Workflow Actions

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria	(Subscription: Renewal Reminder EQUALS 2nd Reminder) AND (Subscription: TO Cancelled)
Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Immediate Workflow Actions

No workflow actions have been added.

Time-Dependent Workflow Actions [See an example](#)

i No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

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

Add Time Trigger

Subscription

Workflow Time Trigger Edit

Workflow Rule	2nd Renewal Reminder		
	10	Days ▼	After ▼
	Subscription: End Date ▼		

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.

Edit Rule 2nd Renewal Reminder

Step 3: Specify Workflow Actions

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria	(Subscription: Renewal Reminder EQUALS 2nd Reminder) AND (Subscription: Me To Cancelled)
Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria


Immediate Workflow Actions

No workflow actions have been added.

Add Workflow Action ▼

Time-Dependent Workflow Actions

[See an example](#)

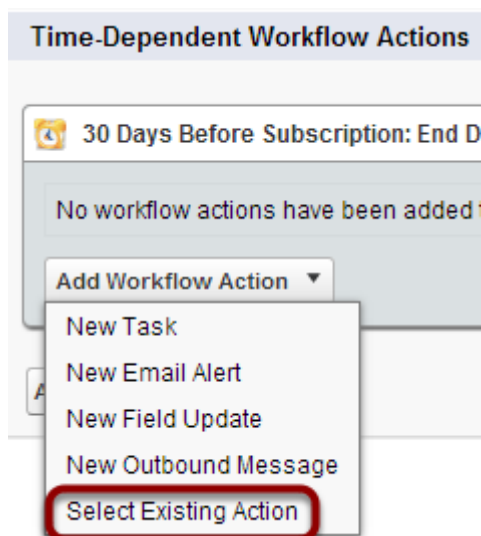
 10 Days After Subscription: End Date [Edit](#) | [Delete](#)

No workflow actions have been added to this time trigger.

Add Workflow Action ▼

Add Time Trigger

Select 'Select Existing Action' from the drop down menu



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

Select Existing Actions

[Help for this Page](#)

Save Cancel

Choose Action Type Search: **Email Alert** or: Find

Available Actions

- Email Alert: Send Membership Confirmation Email sent after a membership has been approved
- Email Alert: send 1st Renewal Reminder Email
- Email Alert: send 2nd Renewal Reminder Email

Selected Actions

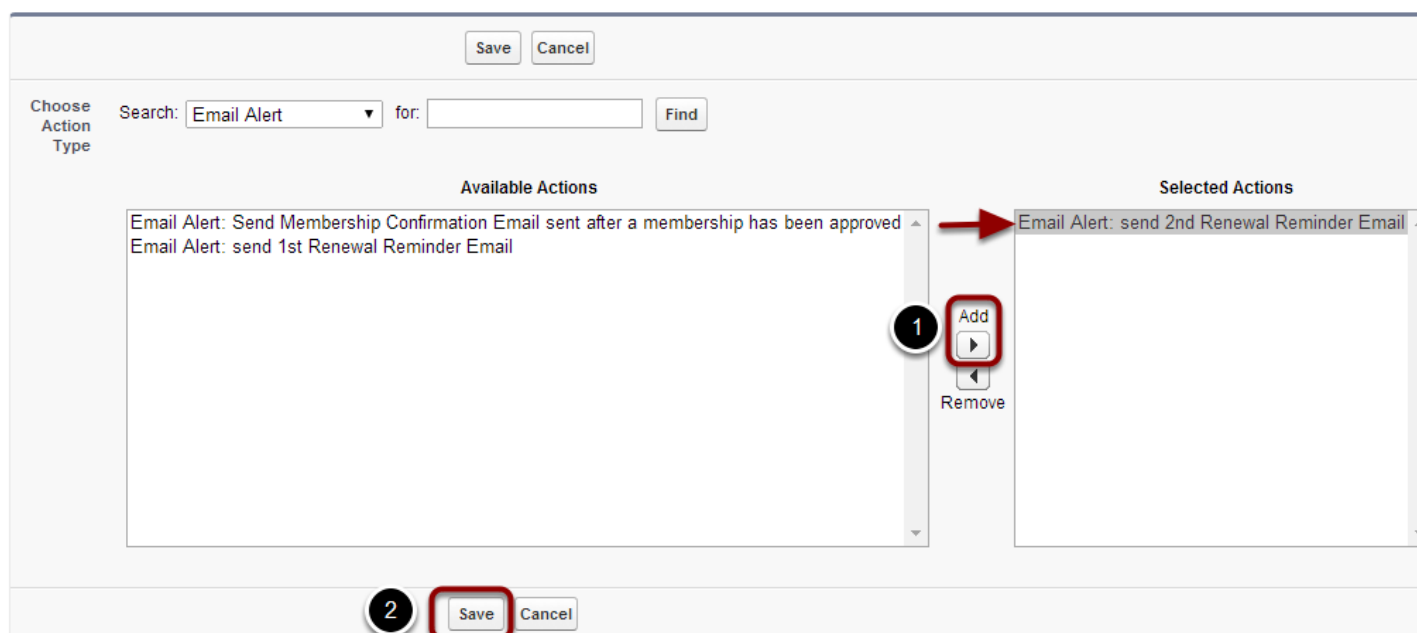
--None--

Add Remove

Save Cancel

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

Select Existing Actions

[Help for this Page](#)


Save Cancel

Choose Action Type

Search: for: Find

Available Actions

- Email Alert: Send Membership Confirmation Email sent after a membership has been approved
- Email Alert: send 1st Renewal Reminder Email

Selected Actions

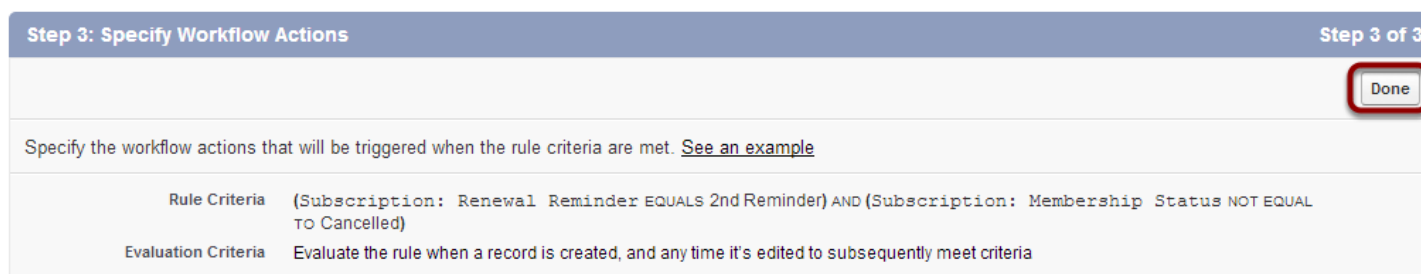
- Email Alert: send 2nd Renewal Reminder Email

1 Add Remove

2 Save Cancel

Select 'Done' button to complete the workflow rule

Edit Rule 2nd Renewal Reminder

[Help for this Page](#)


Step 3: Specify Workflow Actions Step 3 of 3

Done

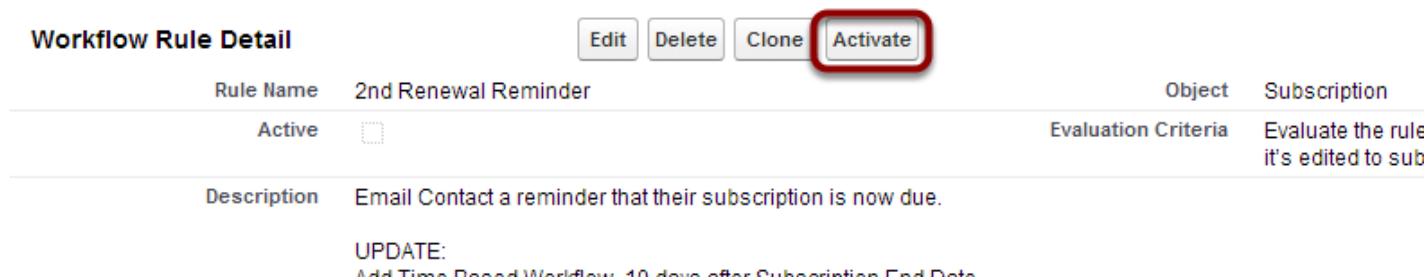
Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria	(Subscription: Renewal Reminder EQUALS 2nd Reminder) AND (Subscription: Membership Status NOT EQUAL TO Cancelled)
Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Select 'Activate' to begin the workflow process

Workflow Rule

2nd Renewal Reminder

[Back to List: Workflow Rules](#)


Workflow Rule Detail Edit Delete Clone Activate

Rule Name	2nd Renewal Reminder	Object	Subscription
Active	<input type="checkbox"/>	Evaluation Criteria	Evaluate the rule it's edited to sub
Description	Email Contact a reminder that their subscription is now due.		
	UPDATE: Add Time Based Workflow: 40 days after Subscription Exp Date		

Set 'Default Workflow User' and Save

Workflow & Approvals Settings

[Help for this Page ?](#)

SaveCancel

Specify a default workflow user. Salesforce.com recommends choosing a user with system administrator privileges.

Default Workflow User

Enabling email approval response lets users reply to email approval requests by typing APPROVE or REJECT in the first line and adding comments in the second line.

Enable Email Approval Response ☐

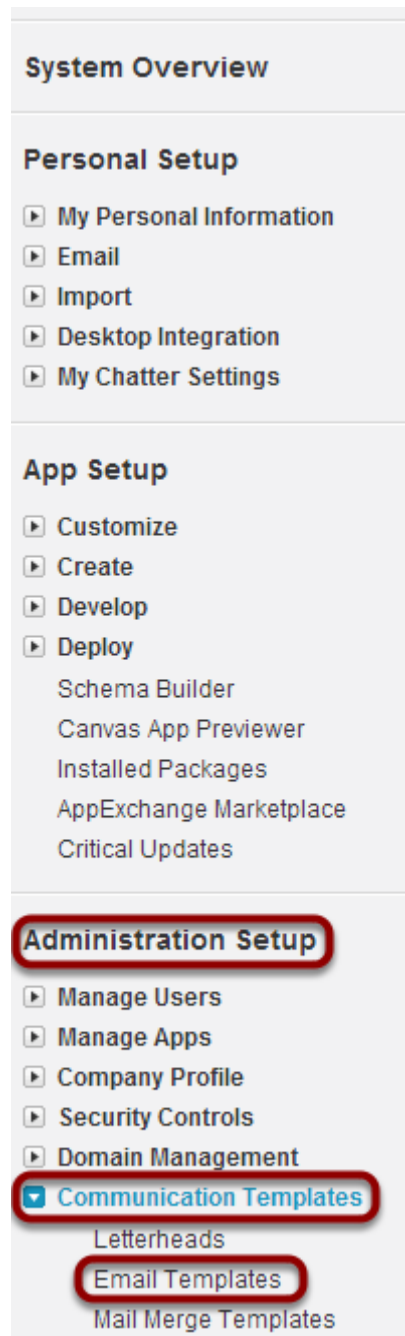
⚠

By enabling the email approval response feature, you agree to allow salesforce.com to process email approval responses, update approval requests for all active users in your organization, and update the approval object on behalf of your organization's users.

SaveCancel

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

AAkonsult Payments

Below is a list of all your email templates in the folder selected. Click the new email templates when sending single emails. For mass emails, only text, HTML






Folder AAkonsult Payments ▼ [Edit](#) | [Create New Folder](#)

Scroll down to find 'Renewal - 2nd Reminder'

AAkonsult Payments

Below is a list of all your email templates in the folder selected. Click the new email templates when sending single emails. For mass emails, only text, HTML

Folder AAkonsult Payments ▼ [Edit](#) | [Create New Folder](#)

New Template			
Action	Email Template Name ↑	Template Type	Available For
Edit Del 	Renewal - 2nd Account Reminder w/ PDF	Visualforce	<input checked="" type="checkbox"/>
Edit Del 	Renewal - 2nd Reminder	Text	<input checked="" type="checkbox"/>
Edit Del 	Renewal - 2nd Reminder w/ PDF	Visualforce	<input checked="" type="checkbox"/>
Edit Del 	Subscription Issue Mailout Process	Text	<input checked="" type="checkbox"/>
Edit Del 	Subscription Issue Payment Process	Text	<input checked="" type="checkbox"/>

A template with a PDF attachment is also available.

Edit and test your template

Text Email Template

Renewal - 2nd 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 Reminder	Available For Use	<input checked="" type="checkbox"/>
Template Unique Name	Renewal_2nd_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 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__Subscription__c.AAkPay__End_Date__c}.

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

How to send out first automated reminders - account level

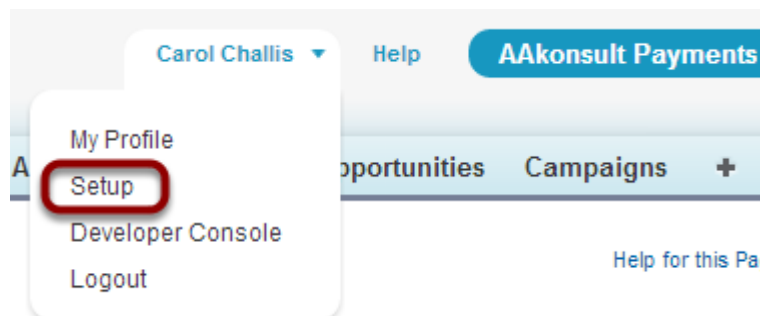
For first membership reminders at an Account (organisational) level.

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]”.

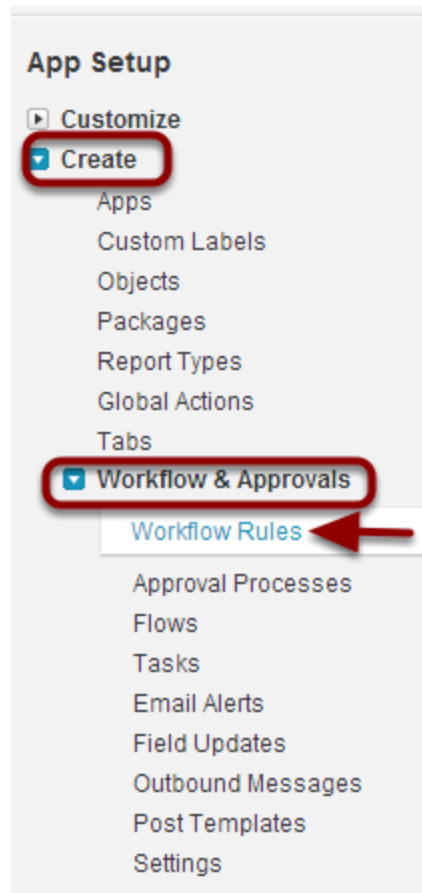
Quick Steps:

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 ?](#)

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 Account Subscription Renewal Reminder [ADD TIME BASED WORKFLOW]'

Configure your organization's workflow by creating workflow rules. 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 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

View: All Workflow Rules ▼ [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O |

New Rule		
Action	Rule Name ↑	Description
Edit Activate	 1st Account Subscription Renewal Reminder [ADD TIME BASED WORKFLOW]	EmailAccount Subscription Contact a reminder that their su UPDATE: Add timebase workflow, 30 days before subscription end da - Email Alert: send 1st Account Subs Renewal Reminder Er - Field Update: set 2nd Reminder Due
Edit Activate	 1st Renewal Reminder [ADD TIME BASED WORKFLOW]	Email Contact a reminder that their subscription is now due UPDATE: Add timebase workflow, 30 days before subscription end da - Email Alert: send 1st Renewal Reminder Email - Field Update: set 2nd Reminder Due Keep in mind Automatic Renewals
Edit Activate	 2nd Account Subscription Renewal Reminder [ADD TIME BASED WORKFLOW]	Email Account Subscription Contact a reminder that their su UPDATE: Add Time Based Workflow, 10 days after Subscription End (- Email Alert: send 2nd Account Subscription Renewal Rem Note: Automatic Renewals Email Contact a reminder that their subscription is now due

Open the circled rule

4. Select 'Clone'

Workflow Rule

1st Account Subscription Renewal Reminder [ADD TIME BASED WORKFLOW] (Managed)

« [Back to List: Workflow Rules](#)



This Workflow Rule is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Workflow Rule Detail

Clone

Activate

Rule Name	1st Account Subscription Renewal Reminder [ADD TIME BASED WORKFLOW]	Object	Account Subscrip
Namespace Prefix	AAkPay	Evaluation Criteria	Evaluate the rule: it's edited to subs
Installed Package	AAkPayments		
Active	<input type="checkbox"/>		
Description	<p>EmailAccount Subscription Contact a reminder that their subscription is now due.</p> <p>UPDATE:</p> <p>Add timebase workflow, 30 days before subscription end date</p> <ul style="list-style-type: none"> - Email Alert: send 1st Account Subs Renewal Reminder Email - Field Update: set 2nd Reminder Due 		

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

Edit Rule 1st Account Subscription Renewal Reminder [ADD TIME BASED WORKFLOW] [Help](#)

Step 2: Configure Workflow Rule

2

Previous

Save & Next

Enter the name, description, and criteria to trigger your workflow rule. In the next step, associate workflow actions with this workflow rule.

Edit Rule

= Required In

1

Object

Account Subscription

Rule Name

1st Account Subscription

Description

4 remaining

EmailAccount Subscription Contact a reminder that their subscription is now due.

5. Select the 'Add Workflow Action'

Edit Rule 1st Account Subscription Renewal Reminder Help for this Page

Step 3: Specify Workflow Actions

Step 3 of 3

Done

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria	(Account Subscription: Renewal Reminder EQUALS 1st Reminder,Set Reminder) AND (Account Subscription: Membership Status NOT EQUAL TO Cancelled)
Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Immediate Workflow Actions

No workflow actions have been added.

Add Workflow Action

New Task

New Email Alert

New Field Update

New Outbound Message

Select Existing Action

Add Time Trigger

Workflow Actions

[See an example](#)

No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

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

5.1 Add existing field update - Set First Reminder Due

Select Existing Actions

[Help for this](#)

1 Save Cancel

Choose Action Type Search: Field Update ▼ for: Find

2 Available Actions

Field Update: set 2nd Reminder Due ^

3 Selected Actions

Field Update: Set 1st Account Reminder ^

Add
▶
Remove
◀

Save Cancel

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

Edit Rule 1st Account Subscription Renewal Reminder

[Help for this Page](#)

Step 3: Specify Workflow Actions
Step 3 of 3

[Done](#)

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria (Account Subscription: Renewal Reminder EQUALS 1st Reminder,Set Reminder) AND (Account Subscription: Membership Status NOT EQUAL TO Cancelled)
Evaluation Criteria Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Immediate Workflow Actions

Action	Type	Description
Edit Remove	Field Update	Set 1st Account Reminder

[Add Workflow Action](#)

Time-Dependent Workflow Actions [See an example](#)

No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

[Add Time Trigger](#)

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

Add Time Trigger

Account Subscription

Workflow Time Trigger Edit

Workflow Rule 1st Account Subscription

30
Days
Before
Account Subscription: End Date

Save
Cancel

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.

Edit Rule 1st Account Subscription

Step 3: Specify Workflow Actions

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria	(Account Subscription: Renewal Reminder EQUALS 1stReminder,Set Reminder) AND Membership Status NOT EQUAL TO Cancelled)
Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Immediate Workflow Actions

No workflow actions have been added.

Add Workflow Action ▼

Time-Dependent Workflow Actions

[See an example](#)

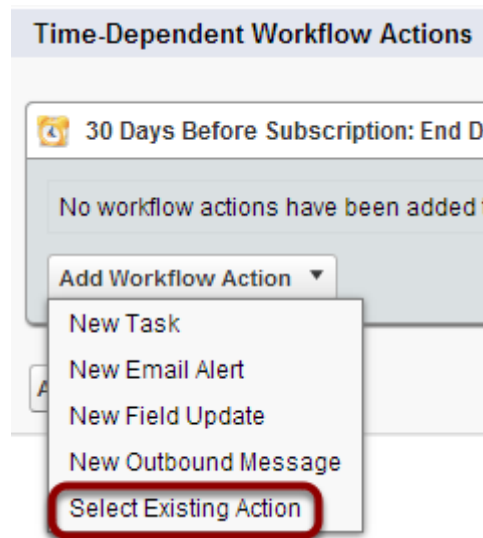
 30 Days Before Account Subscription: End Date [Edit](#) | [Delete](#)

No workflow actions have been added to this time trigger.

Add Workflow Action ▼

Add Time Trigger

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



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

Select Existing Actions

[Help for this Page](#)

Save Cancel

Choose Action Type Search: **Email Alert** or: Find

Available Actions

- Email Alert: Send Membership Confirmation Email sent after a membership has been approved
- Email Alert: send 1st Renewal Reminder Email
- Email Alert: send 2nd Renewal Reminder Email

Selected Actions

--None--

Add
Remove

Save Cancel

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

Select Existing Actions

[Help for this Page](#)

Save Cancel

Choose Action Type Search: Email Alert for: Find

Available Actions

- Email Alert: Send Membership Confirmation Email sent after a membership has been approved
- Email Alert: send 2nd Renewal Reminder Email

Selected Actions

- Email Alert: send 1st Renewal Reminder Email

1 Add Remove

2 Save Cancel

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

Edit Rule 1st Account Subscription

Step 3: Specify Workflow Actions

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)


Rule Criteria (Account Subscription: Renewal Reminder EQUALS 1st Reminder Membership Status NOT EQUAL TO Cancelled)
Evaluation Criteria Evaluate the rule when a record is created, and any time it's edited to subsequent

Immediate Workflow Actions

No workflow actions have been added.

Add Workflow Action ▼

Time-Dependent Workflow Actions [See an example](#)

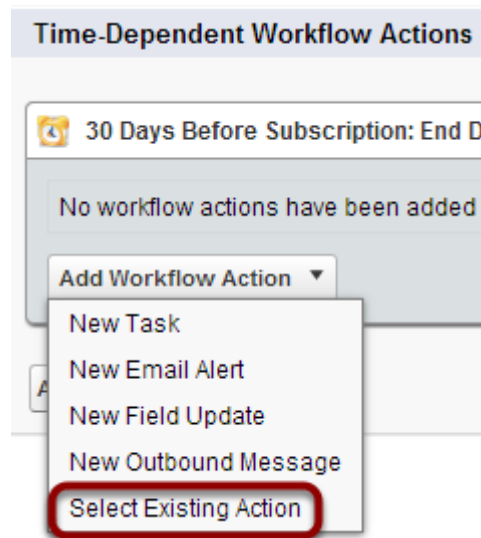
 30 Days Before Account Subscription: End Date [Edit](#) | [Delete](#)

Action	Type	Description
Edit Remove	Email Alert	send 1st Account Subscription Renewal

Add Workflow Action ▼

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

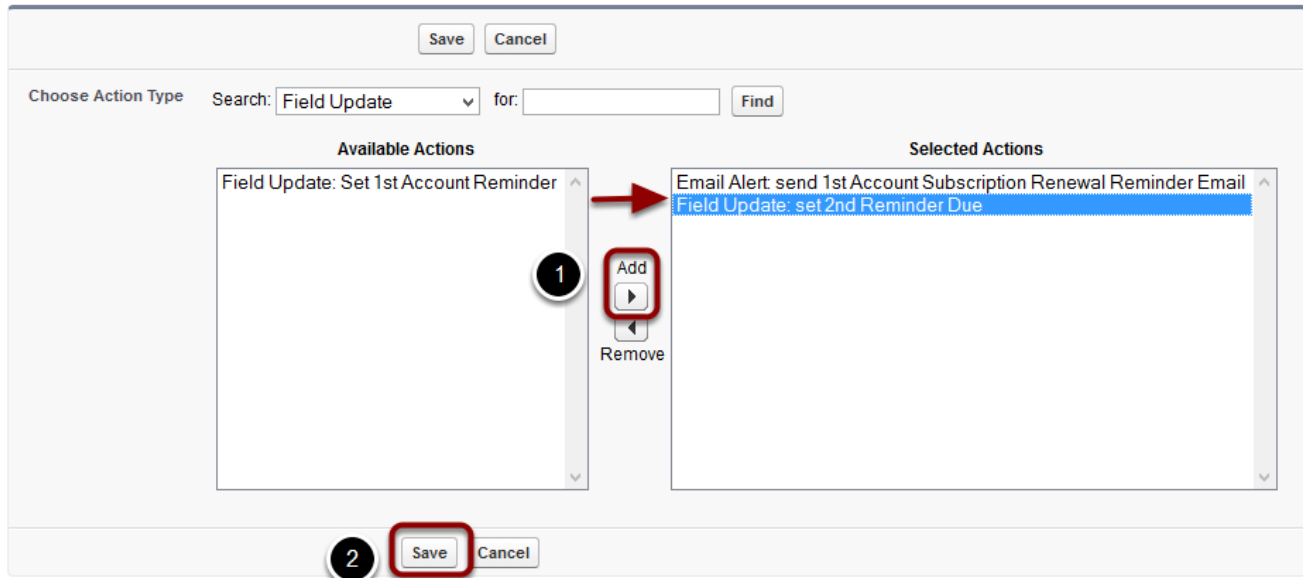
Select Existing Actions

[Help for this Page ?](#)

The screenshot shows a 'Select Existing Actions' dialog box. At the top, there are 'Save' and 'Cancel' buttons. Below them, the 'Choose Action Type' dropdown is set to 'Field Update' (highlighted with a red circle). To the right of the dropdown is a search field with 'for:' and a 'Find' button. The dialog is divided into two main sections: 'Available Actions' on the left and 'Selected Actions' on the right. The 'Available Actions' list contains two items: 'Field Update: Set 1st Account Reminder' and 'Field Update: set 2nd Reminder Due'. The 'Selected Actions' list contains one item: 'Email Alert: send 1st Account Subscription Renewal Reminder Email'. Between the two lists are 'Add' and 'Remove' buttons. At the bottom, there are 'Save' and 'Cancel' buttons.

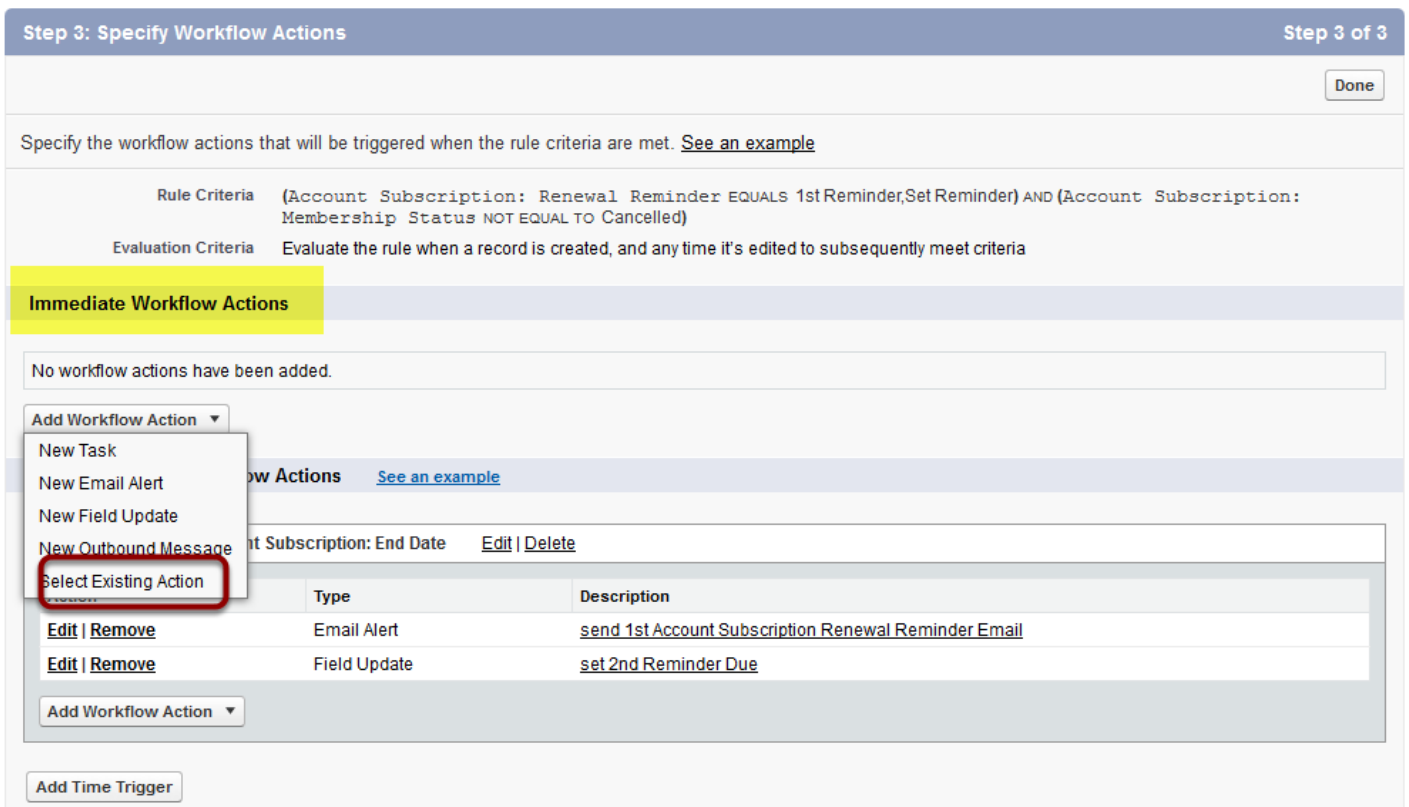
8.3 Add 'Field Update: set 2nd Reminder Due' and press Save

Select Existing Actions

[Help for this Page ?](#)


9. Select the Add Immediate Workflow Actions Section

Edit Rule 1st Account Subscription Renewal Reminder

[Help for this Page ?](#)


Step 3: Specify Workflow Actions Step 3 of 3

[Done](#)

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria (Account Subscription: Renewal Reminder EQUALS 1stReminder,SetReminder) AND (Account Subscription: Membership Status NOT EQUAL TO Cancelled)

Evaluation Criteria Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Immediate Workflow Actions

No workflow actions have been added.

Add Workflow Action ▼

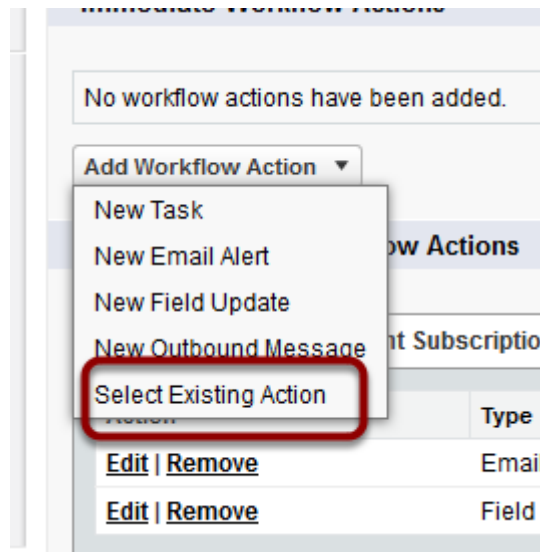
- New Task
- New Email Alert
- New Field Update
- New Outbound Message
- Select Existing Action

Type	Description
Email Alert	send 1st Account Subscription Renewal Reminder Email
Field Update	set 2nd Reminder Due

Add Workflow Action ▼

Add Time Trigger

9.1 Select 'Select Existing Action'



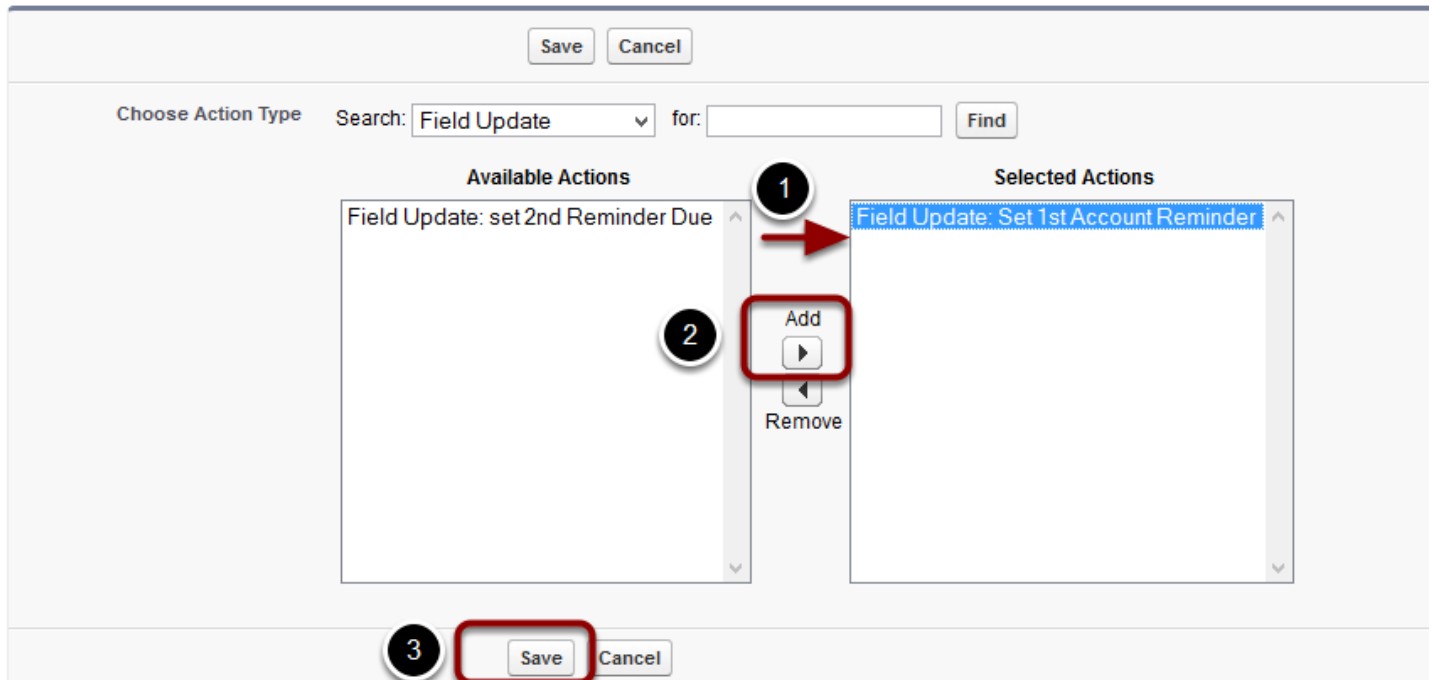
9.2 Select 'Field Update' from the Choose Action Type drop down menu

Select Existing Actions

A screenshot of a "Select Existing Actions" dialog box. At the top, there are "Save" and "Cancel" buttons. Below them, the "Choose Action Type" section has a "Search:" label followed by a dropdown menu showing "Field Update", which is highlighted with a red rectangular box. To the right of the dropdown is a "for:" label and a text input field, followed by a "Find" button. The main area of the dialog is divided into two columns: "Available Actions" and "Selected Actions". The "Available Actions" column contains a list of actions: "Field Update: Set 1st Account Reminder" and "Field Update: set 2nd Reminder Due". The "Selected Actions" column contains "--None--". Between the two columns are "Add" and "Remove" buttons, each with a right-pointing and left-pointing arrow respectively. At the bottom of the dialog, there are "Save" and "Cancel" buttons.

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

Select Existing Actions



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

Edit Rule 1st Account Subscription

[Help for this Page](#)

Step 3: Specify Workflow Actions		Step 3 of 3
		Done
Specify the workflow actions that will be triggered when the rule criteria are met. See an example		
Rule Criteria	(Account Subscription: Renewal Reminder EQUALS 1stReminder,SetReminder) AND (Account Subscription: Membership Status NOT EQUAL TO Cancelled)	
Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria	

10.1 Select 'Activate' to begin the workflow process

Workflow Rule

1st Account Subscription

[« Back to List: Workflow Rules](#)

Workflow Rule Detail

[Edit](#)
[Delete](#)
[Clone](#)
[Activate](#)

Rule Name	1st Account Subscription	Object	Account Subscrip
Active	<input type="checkbox"/>	Evaluation Criteria	Evaluate the rule it's edited to sub:
Description	EmailAccount Subscription Contact a reminder that their subscription is now due. UPDATE: Add timebase workflow 30 days before subscription end date		

10.2 Set 'Default Workflow User' and Save

Workflow & Approvals Settings

[Help for this Page ?](#)


[Save](#)
[Cancel](#)

Specify a default workflow user. Salesforce.com recommends choosing a user with system administrator privileges.

Default Workflow User

Enabling email approval response lets users reply to email approval requests by typing APPROVE or REJECT in the first line and adding comments in the second line.

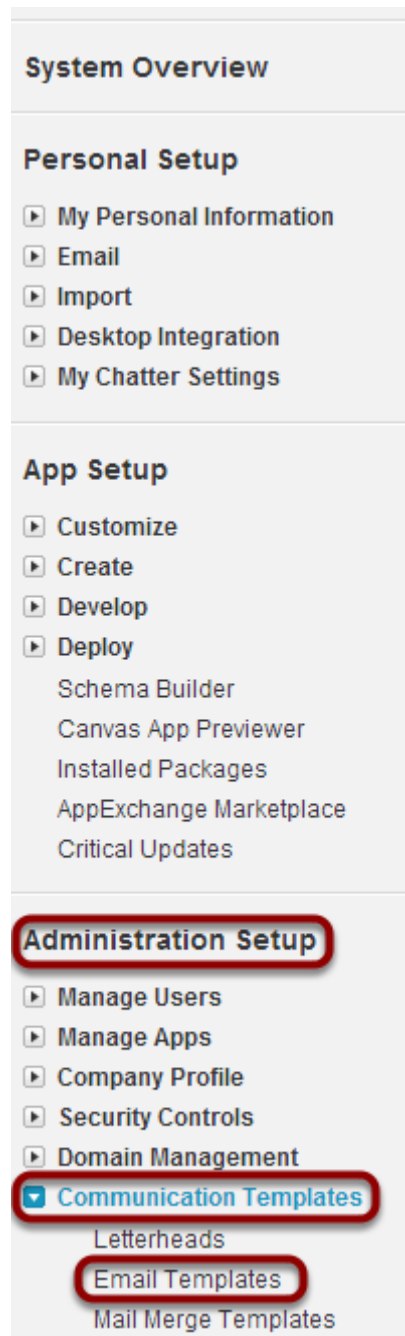
Enable Email Approval Response ☐

 By enabling the email approval response feature, you agree to allow salesforce.com to process email approval responses, update approval requests for all active users in your organization, and update the approval object on behalf of your organization's users.

[Save](#)
[Cancel](#)

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

AAkonsult Payments

Below is a list of all your email templates in the folder selected. Click the new icon to create new email templates when sending single emails. For mass emails, only text, HTML and Visualforce are supported.

Folder AAkonsult Payments ▼ [Edit](#) | [Create New Folder](#)

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

Edit Del		Large Payment/Donation Notification	Text	<input checked="" type="checkbox"/>
Edit Del		Matching Reminder	Text	<input checked="" type="checkbox"/>
Edit Del		Membership Confirmation	Visualforce	<input checked="" type="checkbox"/>
Edit Del		New Direct Debit	Text	<input checked="" type="checkbox"/>
Edit Del		New Online Membership Payment Notification	Visualforce	<input checked="" type="checkbox"/>
Edit Del		New Online Payment Notification	Text	<input checked="" type="checkbox"/>
Edit Del		Pay Later Instructions	Text	<input checked="" type="checkbox"/>
Edit Del		Payment Receipt	Visualforce	<input checked="" type="checkbox"/>
Edit Del		Payment Schedule Invoice	Visualforce	<input checked="" type="checkbox"/>
Edit Del		Recurring Payment Card Expiry	Text	<input checked="" type="checkbox"/>
Edit Del		Recurring Payment Failure	Text	<input checked="" type="checkbox"/>
Edit Del		Recurring Payment Schedule Not Restarted	Text	<input checked="" type="checkbox"/>
Edit Del		Renewal - 1st Account Reminder	Text	<input checked="" type="checkbox"/>
Edit Del		Renewal - 1st Account Reminder w/ PDF	Visualforce	<input checked="" type="checkbox"/>
Edit Del		Renewal - 1st Reminder	Text	<input checked="" type="checkbox"/>
Edit Del		Renewal - 1st Reminder w/ PDF	Visualforce	<input checked="" type="checkbox"/>

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	<input checked="" type="checkbox"/>
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

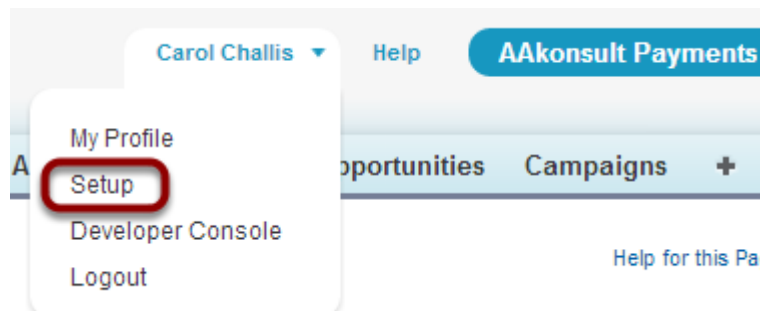
For second membership reminders at an organisational level.

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]”.

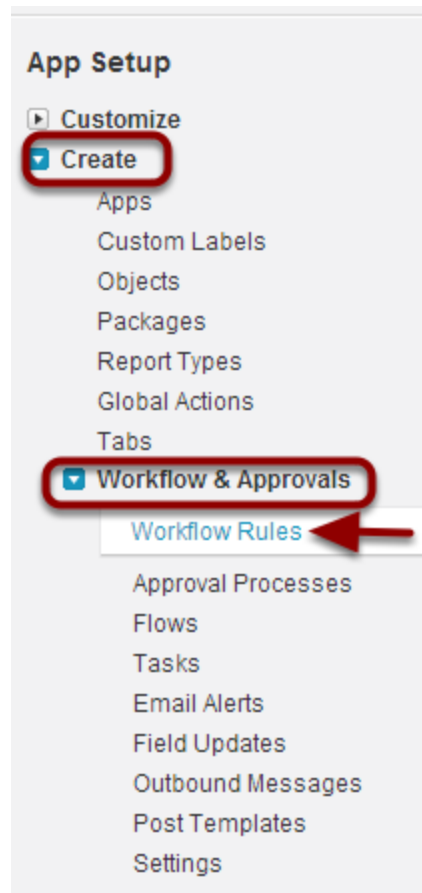
Quick Steps:

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 ?](#)

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 Account Subscription Renewal Reminder [ADD TIME BASED WORKFLOW]'

Edit Del Activate	1st Renewal Reminder	<p>UPDATE: Add timebase workflow, 30 days before subscription end - Email Alert: send 1st Renewal Reminder Email - Field Update: set 2nd Reminder Due</p> <p>Keep in mind Automatic Renewals</p>
Edit Activate	 1st Renewal Reminder [ADD TIME BASED WORKFLOW]	<p>UPDATE: Add timebase workflow, 30 days before subscription end - Email Alert: send 1st Renewal Reminder Email - Field Update: set 2nd Reminder Due</p> <p>Keep in mind Automatic Renewals</p>
Edit Activate	 2nd Account Subscription Renewal Reminder [ADD TIME BASED WORKFLOW]	<p>UPDATE: Add Time Based Workflow, 10 days after Subscription Enc - Email Alert: send 2nd Account Subscription Renewal Re</p> <p>Note: Automatic Renewals</p>
Edit Activate	 2nd Renewal Reminder [ADD TIME BASED WORKFLOW]	<p>UPDATE: Add Time Based Workflow, 10 days after Subscription Enc - Email Alert: send 2nd Renewal Reminder Email</p> <p>Keep in mind Automatic Renewals</p>
Edit Activate	 Account Membership Confirmation	Sends out a confirmation email when a Account members member renews.
Edit Activate	 Batch Payment Processor Not Running [ADD TIME BASED WORKFLOW]	<p>Advise Payment Administrators if a Batch Payment Schedi the last 24 hours. - Add time based action - 1 day aft Last Batch Processor F - Send Email: send reminder that Batch Payments Proces</p> <p>Remind Payment Administrators if a Batch Payment Proce</p>

Open the circled rule

Select 'Clone'

Workflow Rule

2nd Account Subscription Renewal Reminder [ADD TIME BASED WORKFLOW] (Managed)

[« Back to List: Workflow Rules](#)


This Workflow Rule is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Workflow Rule Detail

[Clone](#)
[Activate](#)

Rule Name	2nd Account Subscription Renewal Reminder [ADD TIME BASED WORKFLOW]	Object	Account Subscrip
Namespace Prefix	AAkPay	Evaluation Criteria	Evaluate the rule it's edited to subs
Installed Package	AAkPayments		
Active	<input type="checkbox"/>		
Description	Email Account Subscription Contact a reminder that their subscription is now due.		

UPDATE:

Add Time Based Workflow, 10 days after Subscription End Date

- Email Alert: send 2nd Account Subscription Renewal Reminder Email

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

Edit Rule 2nd Account Subscription Renewal Reminder [ADD TIME BASED WORKFLOW]

Step 2: Configure Workflow Rule

2

Step

Previous

Save & Next

Enter the name, description, and criteria to trigger your workflow rule. In the next step, associate workflow actions with this workflow rule.

Edit Rule

= Required Info

1

Object

Account Subscription

Rule Name

2nd Account Subscription

Description

2 remaining

Email Account Subscription Contact a reminder that their subscription is now due.

Select the 'Add Time Trigger' button

Edit Rule 2nd Account Subscription

Step 3: Specify Workflow Actions

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria	(Account Subscription: Renewal Reminder EQUALS 2nd Reminder) AND (Account Status NOT EQUAL TO Cancelled)
Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Immediate Workflow Actions

No workflow actions have been added.

Add Workflow Action ▾

Time-Dependent Workflow Actions [See an example](#)

No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

Add Time Trigger

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

Add Time Trigger

Account Subscription

Workflow Time Trigger Edit

Workflow Rule	2nd Account Subscription		
	10	Days ▾	After ▾ Account Subscription: End Date

Save Cancel

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.

Edit Rule 2nd Account Subscription

Step 3: Specify Workflow Actions

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria	(Account Subscription: Renewal Reminder EQUALS 2nd Reminder) AND (Account Status NOT EQUAL TO Cancelled)
Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria


Immediate Workflow Actions

No workflow actions have been added.

Add Workflow Action ▼

Time-Dependent Workflow Actions

[See an example](#)

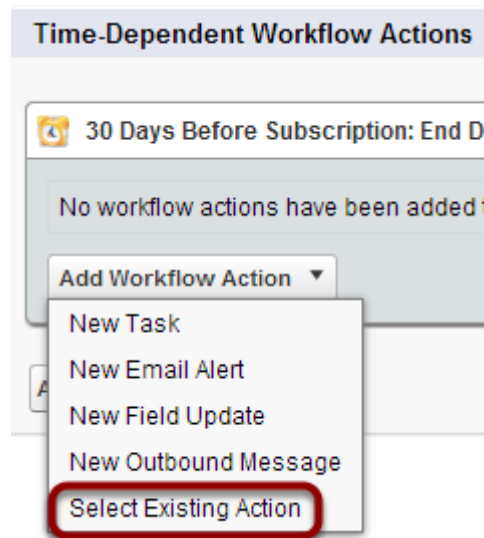
 10 Days After Account Subscription: End Date [Edit](#) | [Delete](#)

No workflow actions have been added to this time trigger.

Add Workflow Action ▼

Add Time Trigger

Select 'Select Existing Action' from the drop down menu



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

Select Existing Actions

[Help fi](#)

Save Cancel

Choose Action Type Search: **Email Alert** for: Find

Available Actions

Email Alert: Send Account Membership Confirmation Email sent after a membership has been approved
Email Alert: send 1st Account Subscription Renewal Reminder Email
Email Alert: send 2nd Account Subscription Renewal Reminder Email

Add
Remove

Select

--Nor

Save Cancel

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

Select Existing Actions

SaveCancel

Choose Action Type

Search: for:

Find

Available Actions

Email Alert: Send Account Membership Confirmation Email sent after a membership has been approved

Email Alert: send 1st Account Subscription Renewal Reminder Email

Selected Actions

Email Alert: send 2nd Account Subscription Renewal Reminder Email

1

Add

Remove

2

SaveCancel

Select 'Done' button to complete the workflow rule

Edit Rule 2nd Account Subscription

Help for this Page ?

Step 3: Specify Workflow Actions

Step 3 of 3

Done

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria

(Account Subscription: Renewal Reminder EQUALS 2nd Reminder) AND (Account Subscription: Membership Status NOT EQUAL TO Cancelled)

Evaluation Criteria

Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Select 'Activate' to begin the workflow process

Workflow Rule

2nd Account Subscription

[Back to List: Workflow Rules](#)

Workflow Rule Detail

EditDeleteClone

Activate

Rule Name	2nd Account Subscription	Object	Account Subscription
Active	<input type="checkbox"/>	Evaluation Criteria	Evaluate the rule it's edited to sub
Description	Email Account Subscription Contact a reminder that their subscription is now due.		

UPDATE

Set 'Default Workflow User' and Save

Workflow & Approvals Settings

[Help for this Page ?](#)

SaveCancel

Specify a default workflow user. Salesforce.com recommends choosing a user with system administrator privileges.

Default Workflow User

Enabling email approval response lets users reply to email approval requests by typing APPROVE or REJECT in the first line and adding comments in the second line.

Enable Email Approval Response ☐

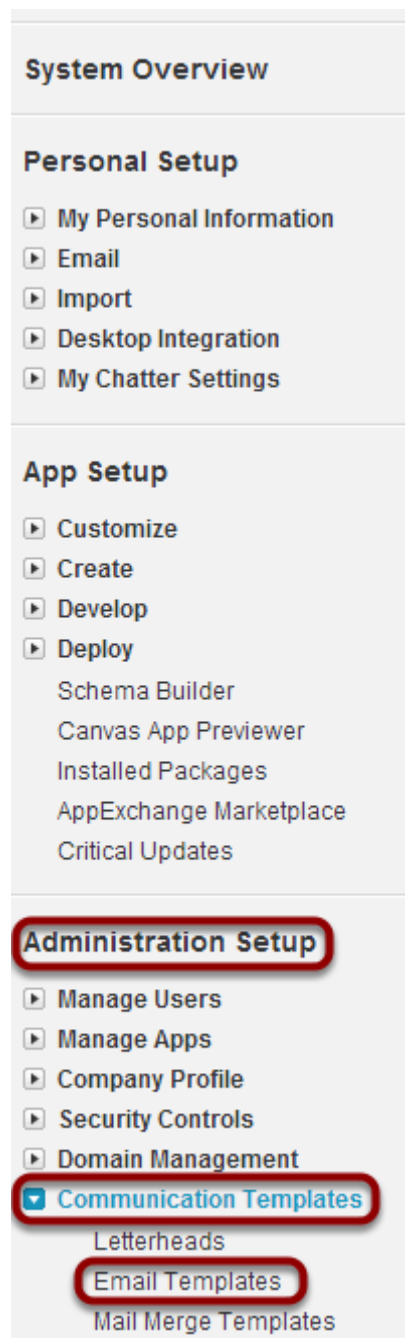
⚠

By enabling the email approval response feature, you agree to allow salesforce.com to process email approval responses, update approval requests for all active users in your organization, and update the approval object on behalf of your organization's users.

SaveCancel

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

AAkonsult Payments

Below is a list of all your email templates in the folder selected. Click the name of the email templates when sending single emails. For mass emails, only text, HTML, and PDF attachments are supported.

Folder AAkonsult Payments ▼ [Edit](#) | [Create New Folder](#)

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

Edit Del		Payment Receipt	visualforce	✓
Edit Del		Payment Schedule Invoice	Visualforce	✓
Edit Del		Recurring Payment Card Expiry	Text	✓
Edit Del		Recurring Payment Failure	Text	✓
Edit Del		Recurring Payment Schedule Not Restarted	Text	✓
Edit Del		Renewal - 1st Account Reminder	Text	✓
Edit Del		Renewal - 1st Account Reminder w/ PDF	Visualforce	✓
Edit Del		Renewal - 1st Reminder	Text	✓
Edit Del		Renewal - 1st Reminder w/ PDF	Visualforce	✓
Edit Del		Renewal - 2nd Account Reminder	Text	✓

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	<input checked="" type="checkbox"/>
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.

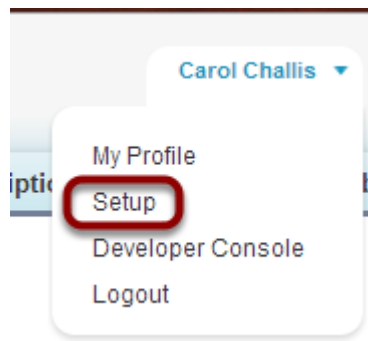
Quick Steps - Contact Level memberships

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

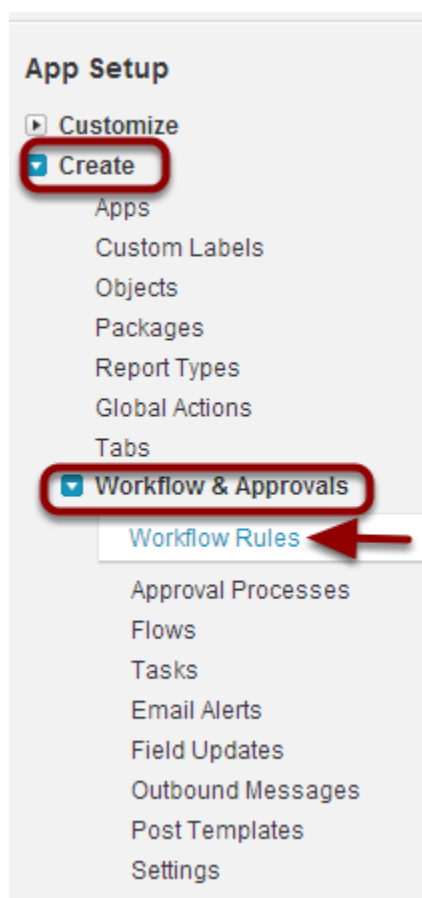
Quick Steps - Account Level memberships

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 ?](#)

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.

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

All Workflow Rules



Configure your organization's workflow by creating workflow rules. 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 later.

View: All Workflow Rules ▾ [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | **M** | N

New Rule

Action	Rule Name ↑	Description
Edit Deactivate	 mark Refunds as Receipted for Matching	Mark Refunds as having been receipted so they will go through the ma
Edit Activate	 Membership Confirmation	Sends out a confirmation email when a membership is approved or ar

A | B | C | D | E | F | G | H | I | J | K | L | **M** | N


5. Select 'Activate'

Workflow Rule

Membership Confirmation (Managed)

[Help for this Page](#) ?

[← Back to List: Workflow Rules](#)

 This Workflow Rule is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Workflow Rule Detail

[Clone](#) **[Activate](#)**

Rule Name	Membership Confirmation			Object	Subscription
Namespace Prefix	AAkPay			Evaluation Criteria	Evaluate the rule when a record is created, and every time it's edited
Installed Package	AAkPayments				
Active	<input type="checkbox"/>				
Description	Sends out a confirmation email when a membership is approved or an approved member renews.				
Rule Criteria	OR(AND(ISNEW(), ISPICKVAL(AAKPay__Membership_Status__c, "Approved")), AND(ISCHANGED(AAKPay__Last_Renewed__c), ISPICKVAL(AAKPay__Membership_Status__c, "Approved")), AND(ISCHANGED(AAKPay__Membership_Status__c), ISPICKVAL(AAKPay__Membership_Status__c, "Approved")))				
Created By	Jeff Challis , 3/10/2013 6:00 PM		Modified By	Carol Challis , 23/07/2014 10:47 AM	

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.

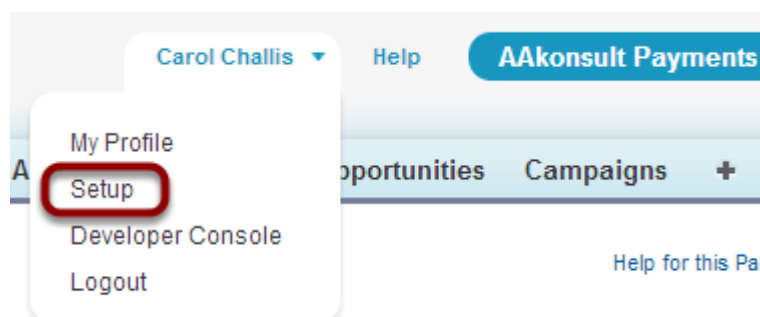
This workflow reminds administrators to restart the Recurring Payment Processor, such someone stop the Recurring Payment Processor, but for some reason forgets to restart it within 1 day.

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.

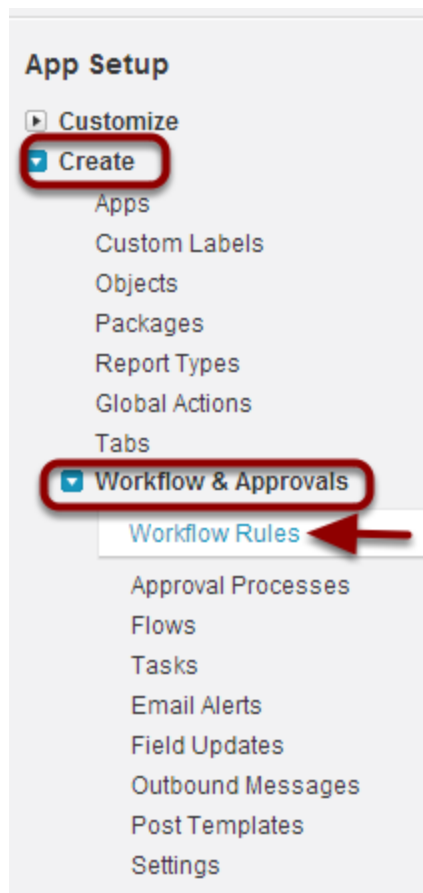
Quick Steps:

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'

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. 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 but 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 Extract that the extract is complete and available for them to download
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 been completed
Edit Deactivate		Large Donation/Payment Alert	Notification is sent to the PaymentType Donor Care when the transaction is greater than the PaymentType Large Payment /
Edit Deactivate		mark Refunds as Receipted for Matching	Mark Refunds as having been receipted so they will go through process
Edit Activate		Membership Confirmation	Sends out a confirmation email when a membership is approaching 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 been made (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 date 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 an email to 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'

Workflow Rule

Payments - Recurring Process [ADD TIME BASED WORKFLOW] (Managed)

« [Back to List: Workflow Rules](#)



This Workflow Rule is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Workflow Rule Detail

[Clone](#)
[Activate](#)

Rule Name	Payments - Recurring Process [ADD TIME BASED WORKFLOW]
Namespace Prefix	AAkPay
Installed Package	AAkPayments
Active	<input type="checkbox"/>
Description	Recurring Payments are placed in the Payments Queues with Recurring Start status. This UPDATE: 1 Hr aft trg -Filed Update: set Status Payment Start
Rule Criteria	Payment Txn: Status EQUALS Recurring Start
Created By	Jeff Challis , 3/10/2013 6:00 PM

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

Edit Rule Payments - Recurring Process [ADD TIME BASED WORKFLOW]

[Help for this Page](#) ?

Step 2: Configure Workflow Rule

Step 2 of 3

[Previous](#)
[Save & Next](#)
[Cancel](#)

Enter the name, description, and criteria to trigger your workflow rule. In the next step, associate workflow actions with this workflow rule.

Edit Rule

| = Required Information

Object	Payment Txn
Rule Name	<input type="text" value="Payments - Recurring"/>
Description	<input type="text" value="Recurring Payments are placed in the Payments Queues with Recurring Start status. This time based workflow moves it to Payment Start to do"/>

21 remaining

5. Select the 'Add Time Trigger' button

Edit Rule Payments – Recurring

Step 3: Specify Workflow Actions

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria	Payment Txn: Status EQUALS Recurring Start
Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Immediate Workflow Actions

No workflow actions have been added.

Add Workflow Action ▼

Time-Dependent Workflow Actions [See an example](#)

i No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

Add Time Trigger

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

Add Time Trigger
Payment Txn

Workflow Time Trigger Edit

Workflow Rule	Payments – Recurring			
	<input type="text" value="1"/>	Hours ▼	After ▼	Rule Trigger Date ▼

Save Cancel

6. Select the 'Add Workflow Action' button

Edit Rule Payments – Recurring

Step 3: Specify Workflow Actions

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria	Payment Txn: Status EQUALS Recurring Start
Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Immediate Workflow Actions

No workflow actions have been added.

Add Workflow Action ▼

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

Immediate Workflow Actions

No workflow actions have been added.

Add Workflow Action ▼

New Task
New Email Alert
New Field Update
New Outbound Message
Select Existing Action

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

Select Existing Actions

Save Cancel

Choose Action Type Search: **Field Update** or: Find

Available Actions

- Field Update: set Status Matching Start
- Field Update: set Status Payment Start
- Field Update: set Status Receipting Complete
- Field Update: set Status Receipting Start

Selected Actions

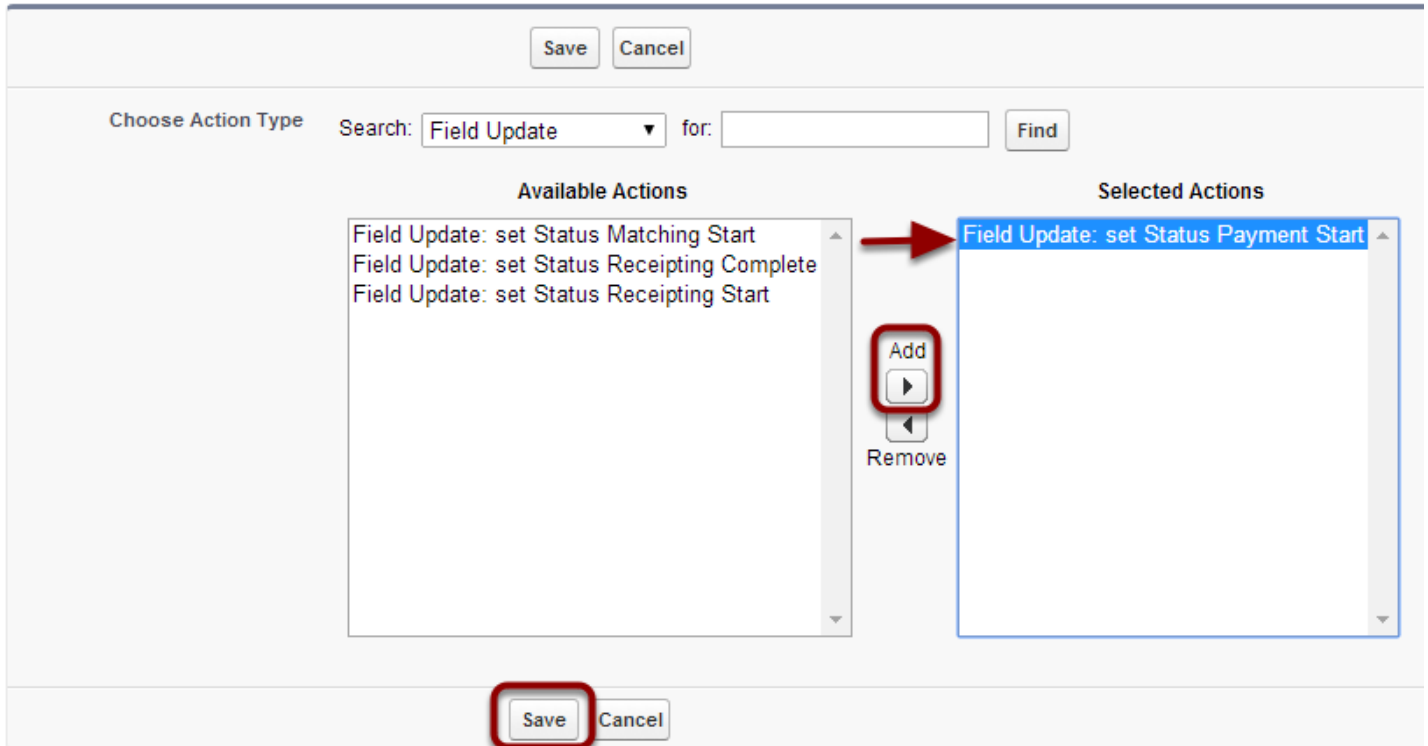
--None--

Add
Remove

Save Cancel

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

Select Existing Actions



Save Cancel

Choose Action Type Search: for: Find

Available Actions

- Field Update: set Status Matching Start
- Field Update: set Status Receipting Complete
- Field Update: set Status Receipting Start

Selected Actions

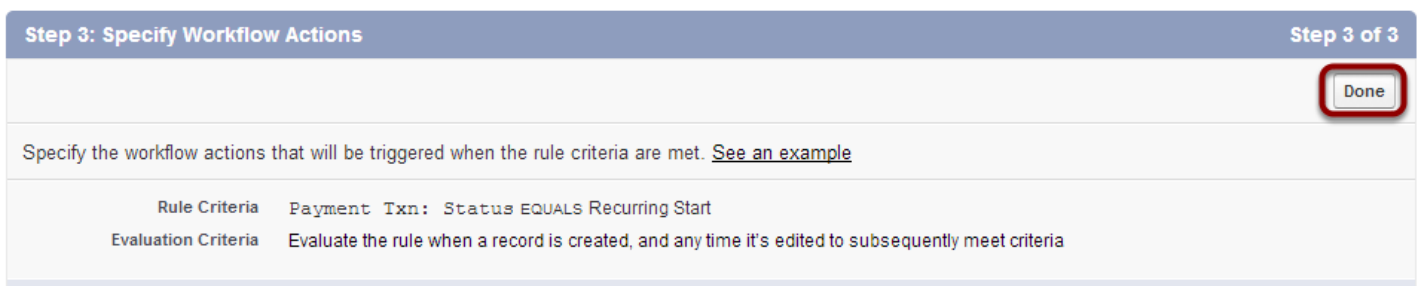
- Field Update: set Status Payment Start

Add Remove

Save Cancel

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

Edit Rule Payments – Recurring

[Help for this Page](#)


Step 3: Specify Workflow Actions Step 3 of 3

Done

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria	Payment Txn: Status EQUALS Recurring Start
Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

8. Select 'Activate' to begin the workflow process

Workflow Rule

Payments – Recurring

« Back to List: Workflow Rules

Workflow Rule Detail

Edit

Delete

Clone

Activate

Rule Name	Payments – Recurring	Object	Payment Txn
Active	<input type="checkbox"/>	Evaluation Criteria	Evaluate the rule when time it's edited to sub:
Description	Recurring Payments are placed in the Payments Queues with Recurring Start status. This time based workflow do the payment transactions.		

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.

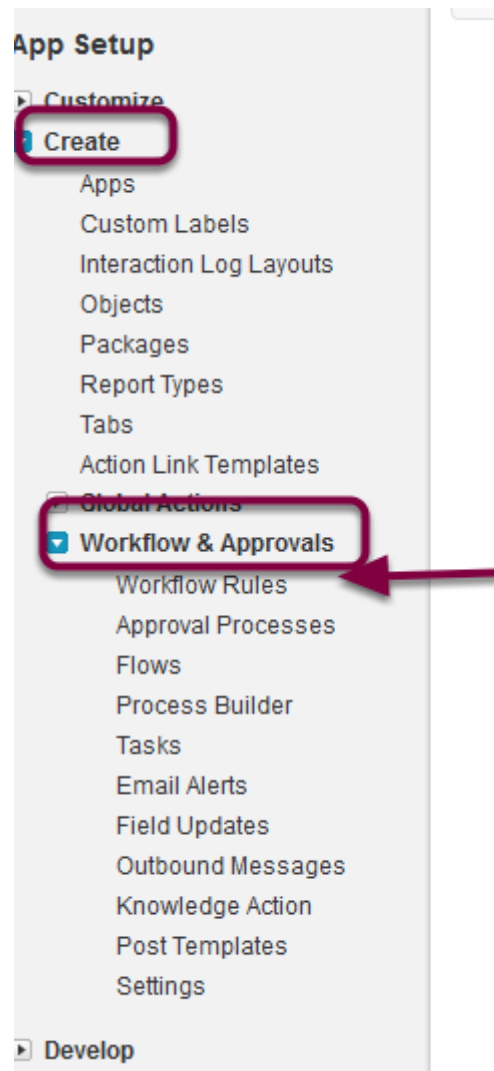
Quick Steps:

- 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

Personal Setup

- ▶ My Personal Information
- ▶ Email
- ▶ Import
- ▶ Desktop Integration
- ▶ My Chatter Settings
- ▶ My Connected Data


App Setup

- ▶ Customize
- Create
 - Apps
 - Custom Labels
 - Interaction Log Layouts
 - Objects
 - Packages
 - Report Types
 - Tabs
 - Action Link Templates
 - Global Actions
 - Workflow & Approvals
 - Workflow Rules
 - Approval Processes
 - Flows
 - Process Builder
 - Tasks
 - Email Alerts
 - Field Updates
 - Outbound Messages
 - Knowledge Action
 - Post Templates
 - Settings
- ▶ Develop
- ▶ Deploy
 - Schema Builder
 - Lightning App Builder New!

Action	Rule Name ↑	Description
Edit Activate	 <u>Recurring Payment Card Expire [ADD TIME BASED WORKFLOW]</u>	When a card is about to expire, this wor UPDATE: - Add Time based workflow - 7 days pri
Edit Deactivate	 <u>Recurring Payment Card Expiry</u>	For organisations that need to get their Alert is sent to INTERNAL staff
Edit Deactivate	 <u>Recurring Payment Error</u>	Should a card be declined during a rec Remind Payment Administrators if a Re
Edit Activate	 <u>Recurring Payments Restart Reminder [ADD TIME BASED WORKFLOW]</u>	UPDATE: Add time based workflow - 1 day after ru - Email Alert: send reminder that Recurr
Edit Activate	 <u>Refund Approval</u>	This is a sample simple approval requ This workflow needs to have the email r
Edit Deactivate	 <u>Send Annual Statement</u>	Is triggered by the Annual Statement Se Sends the Visualforce Mass Annual Sta
Edit Deactivate	 <u>Send Client Direct Debit Signup forms</u>	After a new online Direct Debit Facility h
Edit Deactivate	 <u>Send Interim Refund Notification</u>	Activate this method if you are not using
Edit Deactivate	 <u>Send Interim Receipt</u>	Activate this method if you are not using
Edit Deactivate	 <u>Send Pay Later Instructions</u>	When the online Payment Method is Inv
Edit Deactivate	 <u>Send Payment Schedule Invoice</u>	When a Payment Schedule Recurring P
Edit Deactivate	 <u>send Receipt Automatic</u>	Use this option to automatically send re
Edit Deactivate	 <u>Send Receipt Manual</u>	This workflow rule if you wish to manua
Edit Deactivate	 <u>Send Recurring Payment Suspended Alert</u>	Should a Recurring Payment be attemp Alert is sent to INTERNAL Staff
Edit Deactivate	 <u>Send Recurring Payment Suspended Alert to Payer</u>	Should a Recurring Payment be attemp This workflow sends and email to the P.
Edit Deactivate	 <u>set 1st Reminder Due</u>	Change the status to 1st Reminder due
Edit Deactivate	 <u>set Matching Start</u>	When receipting complete, update statu
Edit Deactivate	 <u>skip Receipt Automatic</u>	This option is used when the AAkonsult
Edit Deactivate	 <u>Subscription Issue Mailout Generation Notification of Completion</u>	Subscription Issue Mailout Generation I
Edit Deactivate	 <u>Subscription Issue Payment Generation Notification of Completion</u>	Subscription Issue Payment Generation

2.1 Select 'Clone'

Workflow Rule
Recurring Payment Card Expire [ADD TIME BASED WORKFLOW] (Managed)
[Back to List: Workflow Rules](#)

 This Workflow Rule is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Workflow Rule Detail

Rule Name	Recurring Payment Card Expire [ADD TIME BASED WORKFLOW]
Namespace Prefix	AAkPay
Installed Package	AAkPayments
Active	<input type="checkbox"/>
Description	When a card is about to expire, this workflow sends an automated email to the card holder asking them to update their details. UPDATE: - Add Time based workflow - 7 days prior to card expiry - Send Credit Card is about to expire
Rule Criteria	(Recurring Payment: Recurring Payment Status EQUALS Active) AND (Recurring Payment: Record Type EQUALS Credit Card)
Created By	jeff.challis, 25/07/2015 2:11 PM

Clone **Activate**

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

Edit Rule Recurring Payment Card Expire [ADD TIME BASED WORKFLOW] [Help for this Page](#)

Step 2: Configure Workflow Rule Step 2 of 3

[Previous](#) **[Save & Next](#)** [Cancel](#)

Enter the name, description, and criteria to trigger your workflow rule. In the next step, associate workflow actions with this workflow rule.

Edit Rule ! = Required Information

Object: Recurring Payment

Rule Name: **g Payment Card Expire**

Description: **UPDATE:**
- Add Time based workflow - 7 days prior to card expiry - Send Credit Card is about to expire

Evaluation Criteria

Evaluate the rule when a record is:

☐ created

☐ created, and every time it's edited

☒ created, and any time it's edited to subsequently meet criteria [i](#)

How do I choose?

Rule Criteria

Run this rule if the following criteria are met:

Field	Operator	Value	
Recurring Payment Recurring Payment Status	equals	Active	AND
Recurring Payment Record Type	equals	Credit Card	AND
Recurring Payment Card Expiry Date	not equal to		AND
--None--	--None--		AND
--None--	--None--		

3. Select the 'Add Time Trigger' button

Edit Rule Recurring Payment Card Expire

[Help for this Page](#)

Step 3: Specify Workflow Actions Step 3 of 3

[Done](#)

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria	(Recurring Payment: Recurring Payment Status EQUALS Active) AND (Recurring Payment: Record Type EQUALS Credit Card) AND (Recurring Payment: Card Expiry Date NOT EQUAL TO null)
Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Immediate Workflow Actions

No workflow actions have been added.

Add Workflow Action

Time-Dependent Workflow Actions [See an example](#)

No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

Add Time Trigger

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

Add Time Trigger

Recurring Payment

Workflow Time Trigger Edit

Workflow Rule

Recurring Payment Card Expire

7

Days

Before

Recurring Payment: Card Expiry Date

Save

Cancel

3.2 Select the 'Add Workflow Action' button

Edit Rule Recurring Payment Card Expire

Step 3: Specify Workflow Actions

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria	(Recurring Payment: Recurring Payment Status EQUALS Active) AND (Recurring Payment Card Expiry Date NOT EQUAL TO null)
Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Immediate Workflow Actions

No workflow actions have been added.

Add Workflow Action ▼

Time-Dependent Workflow Actions [See an example](#)

 7 Days Before Recurring Payment: Card Expiry Date [Edit](#) | [Delete](#)

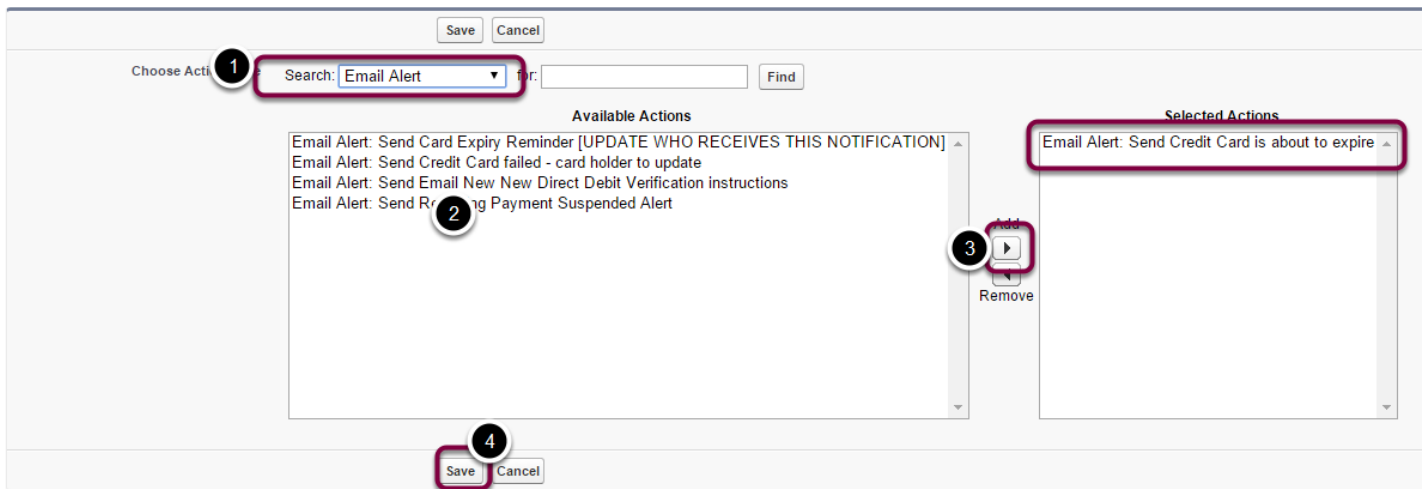
No workflow actions have been added to this time trigger.

Add Workflow Action ▼

- New Task
- New Email Alert
- New Field Update
- New Outbound Message
- Select Existing Action

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

Select Existing Actions

[Help for this Page](#)


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

Edit Rule Recurring Payment Card Expiry *** TEMPLATE ****

[Help for this Page](#)


Step 3 of 3

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria	Evaluation Criteria
(Recurring Payment: Recurring Payment Status EQUALS Active) AND (Recurring Payment: Record Type EQUALS Credit Card) AND (Recurring Payment: Card Expiry Date NOT EQUAL TO null)	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Immediate Workflow Actions

No workflow actions have been added.

Time-Dependent Workflow Actions [See an example](#)

Action	Type	Description
Edit Remove	Email Alert	Send Credit Card is about to expire

3.5 Select 'Activate' to begin the workflow process

Workflow Rule

Recurring Payment Card Expiry *** TEMPLATE ****

[Help for this Page](#)[← Back to List: Workflow Rules](#)

Workflow Rule Detail

[Edit](#) [Delete](#) [Clone](#) [Activate](#)

Rule Name	Recurring Payment Card Expiry *** TEMPLATE ****	Object	Recurring Payment
Namespace Prefix	AAkPay	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Active	<input type="checkbox"/>		
Description	[NOT IN USE] When a card is about to expire, this workflow sends an automated email to the card holder asking them to update their details. UPDATE: - Add Time based workflow - 7 days prior to card expiry - Send Credit Card is about to expire		
Rule Criteria	(Recurring Payment: Recurring Payment Status EQUALS Active) AND (Recurring Payment: Record Type EQUALS Credit Card) AND (Recurring Payment: Card Expiry Date NOT EQUAL TO null)		
Created By	Jeff Challis , 24/07/2015 8:15 PM	Modified By	Jeff Challis , 25/07/2015 2:46 PM

Workflow Actions

[Edit](#)

Immediate Workflow Actions

No workflow actions have been added.

Time-Dependent Workflow Actions [See an example](#)

 7 Days Before Recurring Payment: Card Expiry Date

Type	Description
Email Alert	Send Credit Card is about to expire

[Chat](#)

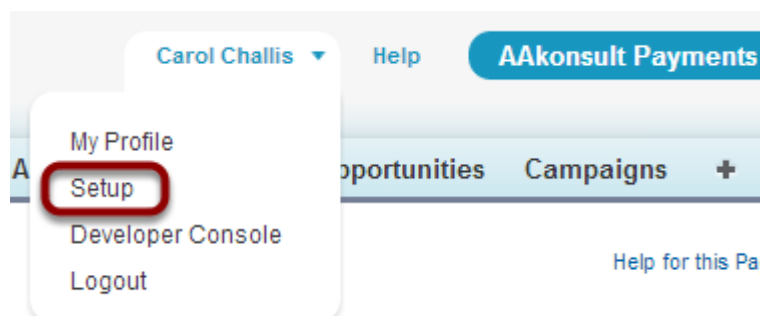
How to set up a recurring payment restart reminder

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.

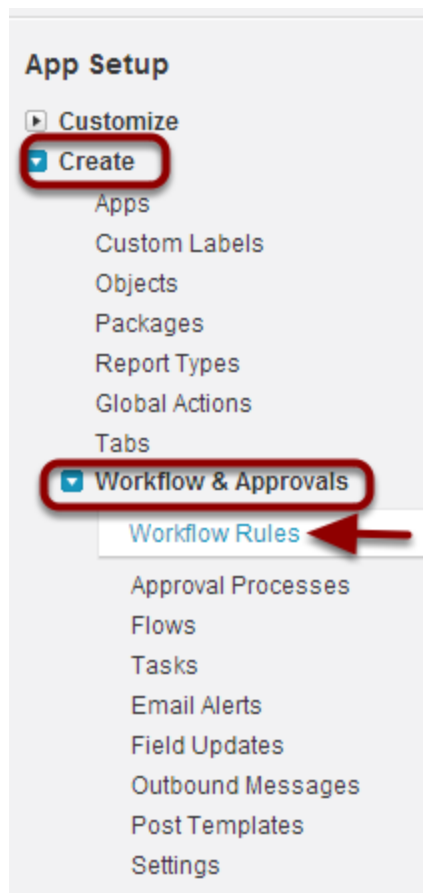
Quick Steps:

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:

- :: 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. 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 been made (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 time based workflow moves it to Payment Start to do the payment. UPDATE: 1 Hr aft trg -Filed Update: set Status Payment Start
Edit Del Activate	Payments – Recurring	Recurring Payments are placed in the Payments Queues with time based workflow moves it to Payment Start to do the payment. 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 date, 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 an email, 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 Schedule restarted within 24 hours UPDATE: Add time based workflow - 1 day after rule trigger - Email Alert: send reminder that Recurring Payments Process
Edit Deactivate	 Send Client Direct Debit Signup forms	After a new online Direct Debit Facility has been applied for, send what they need to do next in order to have their facility activated.
Edit Deactivate	 Send Interim Refund Notification	Activate this method if you are not using the instant refund notification of the refund confirmation to the online payer.
Edit Activate	 Send Interim Receipt	Activate this method if you are not using the instant receipts. Send payment confirmation to the online payer.
Edit Deactivate	 Send Pay Later Instructions	When the online Payment Method is Invoice Me, Pledge, 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'

Workflow Rule

Recurring Payments Restart Reminder [ADD TIME BASED WORKFLOW] (Managed)

[« Back to List: Workflow Rules](#)


This Workflow Rule is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Workflow Rule Detail

[Clone](#)
[Activate](#)

Rule Name	Recurring Payments Restart Reminder [ADD TIME BASED WORKFLOW]	Object	Merchant Facility
Namespace Prefix	AAkPay	Evaluation Criteria	Evaluate the rule if it's edited to sub
Installed Package	AAkPayments		
Active	<input type="checkbox"/>		
Description	Remind Payment Administrators if a Recurring Payment Schedule has been stopped, but not restarted within 24 hours. UPDATE: Add time based workflow - 1 day after rule trigger - Email Alert: send reminder that Recurring Payments Processor has been st.		
Rule Criteria	(Merchant Facility: cronTriggerId EQUALS null) AND (Merchant Facility: Primary EQU		

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

Edit Rule Recurring Payments Restart Reminder [ADD TIME BASED WORKFLOW] [Help for this](#)

Step 2: Configure Workflow Rule

2

Step

[Previous](#)
[Save & Next](#)

Enter the name, description, and criteria to trigger your workflow rule. In the next step, associate workflow actions with this workflow rule.

Edit Rule

= Required Info

1

Object

Merchant Facility

Rule Name

Recurring Payments Rest

Description

0 remaining

Remind Payment Administrators if a Recurring Payment Schedule has been stopped, but not restarted within 24 hours

Evaluation Criteria

5. Select the 'Add Time Trigger' button

Edit Rule Recurring Payments Restart

Step 3: Specify Workflow Actions

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria (Merchant Facility: cronTriggerId EQUALS null) AND (Merchant Facility: Evaluation Criteria Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteri

Immediate Workflow Actions

No workflow actions have been added.

Add Workflow Action ▾

Time-Dependent Workflow Actions [See an example](#)

i No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

Add Time Trigger

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

Add Time Trigger

Merchant Facility

Workflow Time Trigger Edit

Workflow Rule Recurring Payments Restart

1 Days ▾ After ▾ Rule Trigger Date

Save Cancel

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.

Edit Rule Recurring Payments Restart

Step 3: Specify Workflow Actions

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria	(Merchant Facility: cronTriggerId EQUALS null) AND (Merchant Facility: Pr
Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Immediate Workflow Actions

No workflow actions have been added.

Add Workflow Action ▼

Time-Dependent Workflow Actions

[See an example](#)

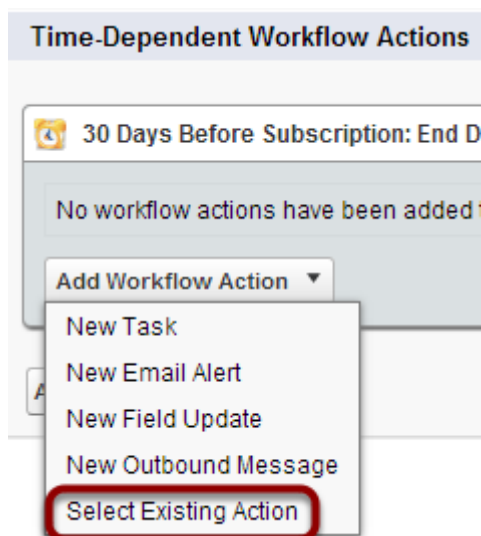
 1 Day After Rule Trigger Date [Edit](#) | [Delete](#)

No workflow actions have been added to this time trigger.

Add Workflow Action ▼

Add Time Trigger

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



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

Select Existing Actions

[Help for this Page](#)

The screenshot shows a "Select Existing Actions" dialog box. At the top, there are "Save" and "Cancel" buttons. Below them, a "Choose Action Type" section has a "Search:" dropdown menu set to "Email Alert" (highlighted with a red rectangle) and a "Find" button. The main area is divided into two panes: "Available Actions" and "Selected Actions". The "Available Actions" pane contains two entries: "Email Alert: send reminder that Batch Payments Processor has been stopped and should be restarted [UPDATE WHO RECEIVES THIS NOTIFICATION]" and "Email Alert: send reminder that Recurring Payments Processor has been stopped and should be restarted [UPDATE WHO RECEIVES THIS NOTIFICATION]". The "Selected Actions" pane is currently empty, showing "--None--". Between the two panes are "Add" and "Remove" buttons.

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

Select Existing Actions

SaveCancel

Choose
Action
Type

Search: Email Alert for: Find

Available Actions

Email Alert: send reminder that Batch Payments Processor has been stopped and should be restarted [UPDATE WHO RECEIVES THIS NOTIFICATION]

1

Add

Remove

2

SaveCancel

Email Alert: send r

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

Edit Rule Recurring Payments Restart

Step 3: Specify Workflow Actions

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria (Merchant Facility: cronTriggerId EQUALS null) AND (Merchant Faci.
Evaluation Criteria Evaluate the rule when a record is created, and any time it's edited to subsequently me

Immediate Workflow Actions

No workflow actions have been added.

Add Workflow Action ▼

Time-Dependent Workflow Actions [See an example](#)

 1 Day After Rule Trigger Date [Edit](#) | [Delete](#)

Action	Type	Description
Edit Remove	Email Alert	send reminder that Recurring Payments f RECEIVES THIS NOTIFICATION

Add Workflow Action ▼

Add Time Trigger

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

Email Alert Edit

SaveSave & NewCancel

Edit Email Alert

Descriptionsend reminder that Recurring Payments Processor has been stopped and should be rest

Unique Namesend_reminder_that Recu ⓘ

Namespace PrefixAAkPay

Installed PackageAAkPayments

ObjectMerchant Facility

Email TemplateRecurring Payment Sched ⓘ

Protected Component☐

Recipient TypeSearch: User ▼or: Find

Recipients

Available Recipients

User: Carol Challis ▲
User: Jeff Challis
User: Joe Acton

Add
▶
Remove
◀

Selected Recipients


Email Field: General Email ▲

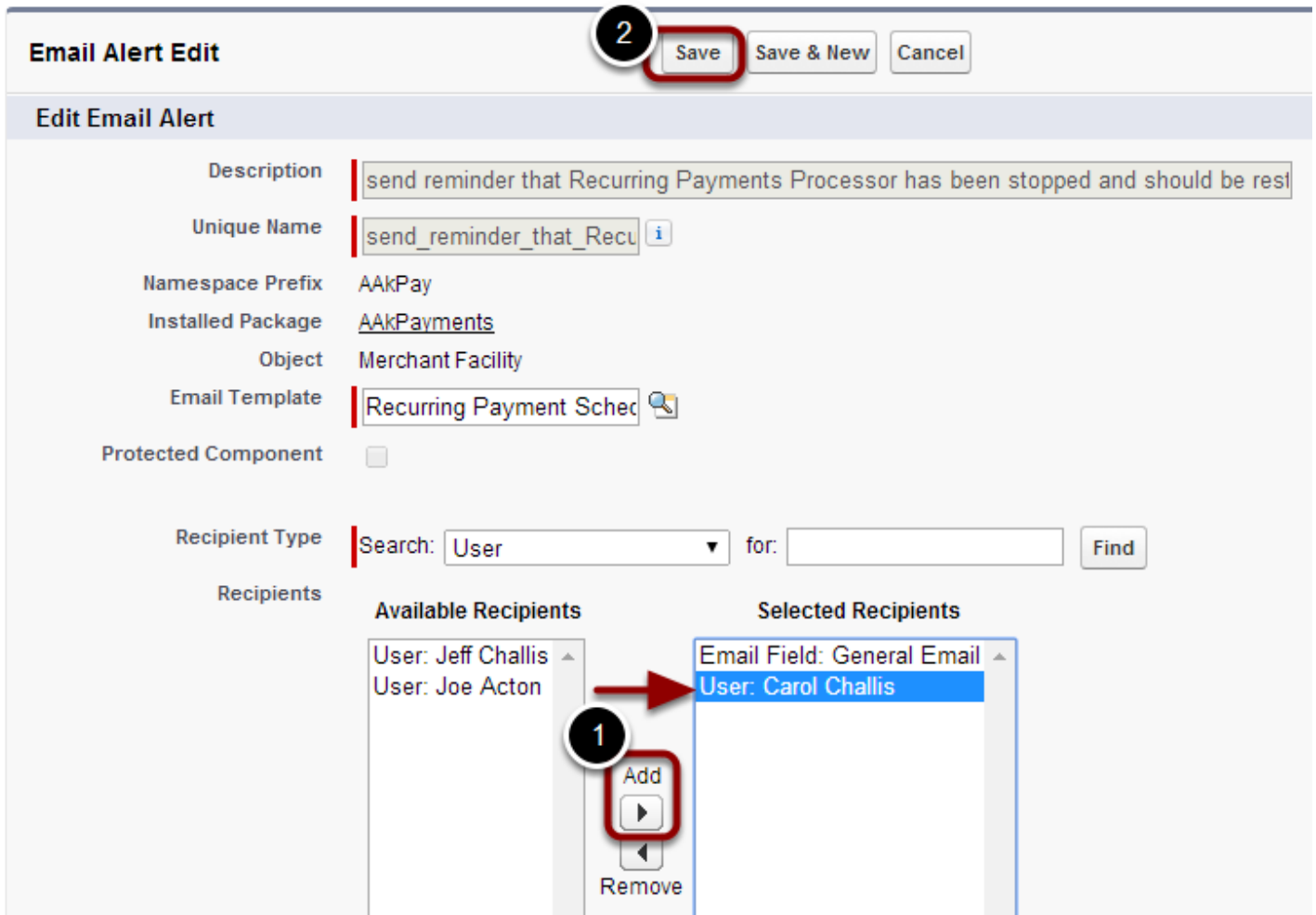
7.2 Add chosen Admin User to receive email notification and 'Save'

Edit Email Alert

send reminder that Recurring Payments Processor has been stopped and should be restarted [UPDATE WHO RECEIVES THIS NOTIFICATION] (Managed)

Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing a processes associated with it.

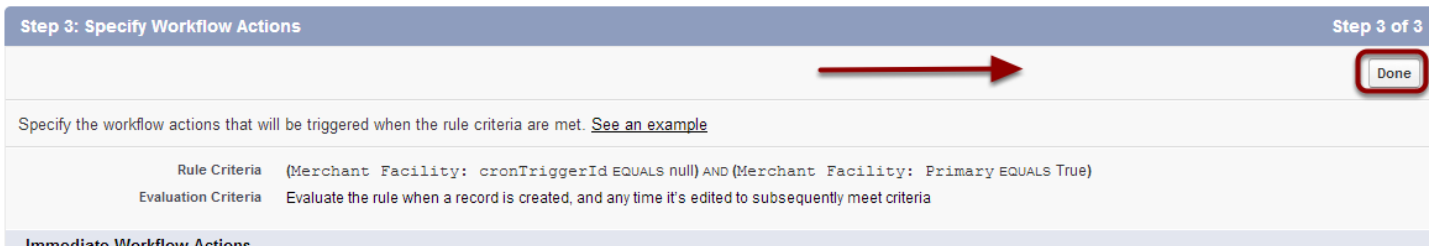
 This Email Alert is managed, meaning that you may only edit certain attributes. [Display More Information](#)



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

Edit Rule Recurring Payments Restart

[Help for this Page](#) 



8.1 Select 'Activate' to begin the workflow process

Workflow Rule

Recurring Payments Restart

[« Back to List: Workflow Rules](#)

Workflow Rule Detail

[Edit](#) [Delete](#) [Clone](#) [Activate](#)

Rule Name	Recurring Payments Restart	Object
Active	<input type="checkbox"/>	Evaluation Criteria
Description	Remind Payment Administrators if a Recurring Payment Schedule has been stopped, but not restarted w	
	UPDATE: Add time based workflow: 1 day after rule trigger	

8.2 Set 'Default Workflow User' and Save

Workflow & Approvals Settings

[Help for this Page](#) ?

Save Cancel

Specify a default workflow user. Salesforce.com recommends choosing a user with system administrator privileges.

Default Workflow User

Enabling email approval response lets users reply to email approval requests by typing APPROVE or REJECT in the first line and adding comments in the second line.

Enable Email Approval Response ☐

⚠ By enabling the email approval response feature, you agree to allow salesforce.com to process email approval responses, update approval requests for all active users in your organization, and update the approval object on behalf of your organization's users.

Save Cancel

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

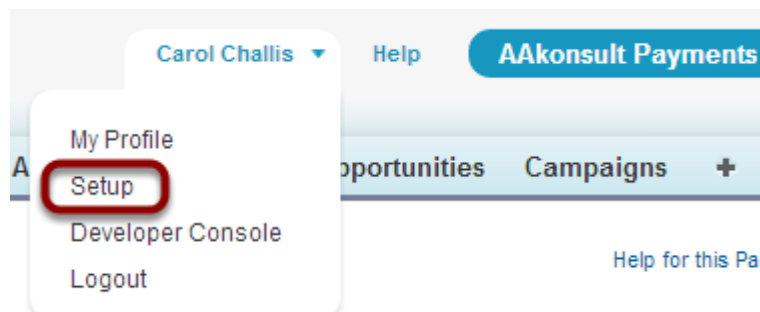
How to set up the batch payments process restart reminder

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.

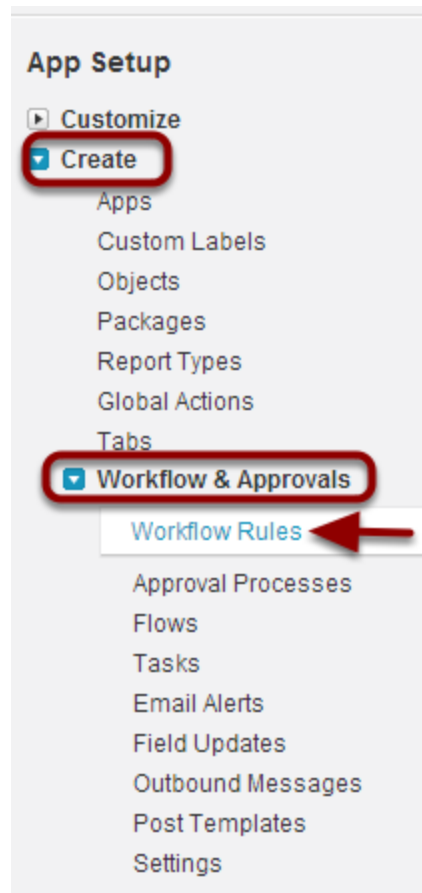
Quick Steps:

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 ?](#)

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

Edit Del Activate	2nd Renewal Reminder	<p>UPDATE: Add Time Based Workflow, 10 days after Subscri - Email Alert: send 2nd Renewal Reminder Email</p> <p>Keep in mind Automatic Renewals</p> <p>Email Contact a reminder that their subscription</p>
Edit Activate	 2nd Renewal Reminder [ADD TIME BASED WORKFLOW]	<p>UPDATE: Add Time Based Workflow, 10 days after Subscri - Email Alert: send 2nd Renewal Reminder Email</p> <p>Keep in mind Automatic Renewals</p>
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]	<p>Advise Payment Administrators if a Batch Payment hours.</p> <p>- Add time based action - 1 day aft Last Batch Pr - Send Email: send reminder that Batch Paymer</p>
Edit Activate	 Batch Payments Process Restart Reminder [ADD TIME BASED WORKFLOW]	<p>Remind Payment Administrators if a Batch Payment within 24 hours.</p> <p>UPDATE: - Add time based action - 1 day aft rule trigger - Send Email: send reminder that Batch Paymer</p>
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 specific
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 specific
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 specific
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 specific

This may be located on the second page.

4. Select 'Clone'

Workflow Rule

Batch Payments Process Restart Reminder [ADD TIME BASED WORKFLOW] (Managed)

[« Back to List: Workflow Rules](#)


This Workflow Rule is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Workflow Rule Detail

[Clone](#) [Activate](#)

Rule Name	Batch Payments Process Restart Reminder [ADD TIME BASED WORKFLOW]	Object
Namespace Prefix	AAkPay	Evaluation Criteria
Installed Package	AAkPayments	
Active	<input type="checkbox"/>	
Description	Remind Payment Administrators if a Batch Payment Processor has been stopped, but not restarted within UPDATE: - Add time based action - 1 day aft rule trigger - Send Email: send reminder that Batch Payments Processor has been stopped and shou	
Rule Criteria	(Merchant Facility: cronTriggerBatchId EQUALS null) AND (Merchant Facility: Pri	
Created By	Jeff Challis , 3/10/2013 6:00 PM	Modified By

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

Edit Rule Batch Payments Process Restart Reminder [ADD TIME BASED WORKFLOW]

[Help for th](#)

Step 2: Configure Workflow Rule

2

Ste

Previous

Save & Next

Enter the name, description, and criteria to trigger your workflow rule. In the next step, associate workflow actions with this workflow rule.

Edit Rule

= Required In

1

Object

Merchant Facility

Rule Name

Batch Payments Process

Description

0 remaining

Remind Payment Administrators if a Batch Payment Processor has been stopped, but not restarted within 24 hours.

Evaluation Criteria

5. Select the 'Add Time Trigger' button

Edit Rule Batch Payments Process Restart Reminder

Step 3: Specify Workflow Actions

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria	(Merchant Facility: cronTriggerBatchId EQUALS null) AND (Merchant Fa
Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet c

Immediate Workflow Actions

No workflow actions have been added.

[Add Workflow Action](#) ▼

Time-Dependent Workflow Actions [See an example](#)

1 No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

[Add Time Trigger](#)

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

Add Time Trigger

Merchant Facility

Workflow Time Trigger Edit

Workflow Rule	Recurring Payments Restart			
	1	Days ▼	After ▼	Rule Trigger Date

[Save](#) [Cancel](#)

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

Edit Rule Batch Payments Process Restart Reminder

Step 3: Specify Workflow Actions

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria	(Merchant Facility: cronTriggerBatchId EQUALS null) AND (Merchant Faci
Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet crite

Immediate Workflow Actions

No workflow actions have been added.

Add Workflow Action ▼

Time-Dependent Workflow Actions

[See an example](#)

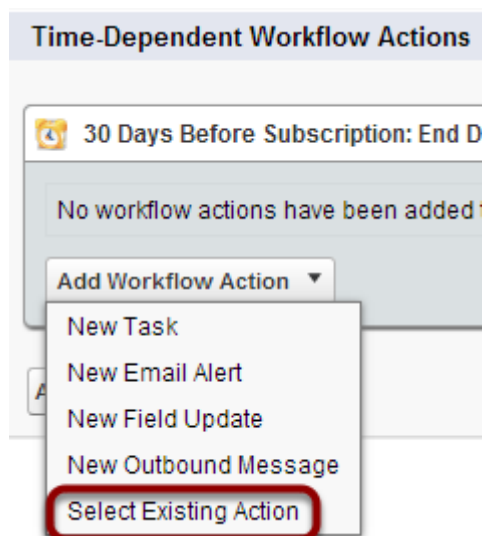
 1 Day After Rule Trigger Date [Edit](#) | [Delete](#)

No workflow actions have been added to this time trigger.

Add Workflow Action ▼

Add Time Trigger

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



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

Select Existing Actions

[Help for this Page](#)

Save Cancel

Choose Action Type Search: Email Alert ▼ for: Find

Available Actions

Email Alert: send reminder that Batch Payments Processor has been stopped and should be restarted [UPDATE WHO RECEIVES THIS NOTIFICATION]
Email Alert: send reminder that Recurring Payments Processor has been stopped and should be restarted [UPDATE WHO RECEIVES THIS NOTIFICATION]

Add
Remove

Selected Actions
--None--

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

Select Existing Actions

Save Cancel

Choose Action Type Search: **Email Alert** for: Find

Available Actions

Email Alert: send reminder that Recurring Payments Processor has been stopped and should be restarted [UPDATE WHO RECEIVES THIS NOTIFICATION]

1 Add Remove

2 Save Cancel

Scroll across image to see actions.

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

Edit Rule Batch Payments Process Restart Reminder

Step 3: Specify Workflow Actions

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria	(Merchant Facility: cronTriggerBatchId EQUALS null) AND (Merchant Facility: cronTriggerBatchId NOT EQUALS null)
Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently change any of the fields in the criteria

Immediate Workflow Actions

No workflow actions have been added.

Add Workflow Action ▼

Time-Dependent Workflow Actions [See an example](#)

 1 Day After Rule Trigger Date [Edit](#) | [Delete](#)

Action	Type	Description
Edit Remove	Email Alert	send reminder that Batch Paym NOTIFICATION]

Add Workflow Action ▼


Add Time Trigger

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

Email Alert Edit Save Save & New Cancel

Edit Email Alert


Description

Unique Name 

Namespace Prefix

Installed Package



Object

Email Template 

Protected Component ☐

Recipient Type Search: for: Find

Recipients

Available Recipients		Selected Recipients
User: Carol Challis	<div>Add</div> <div></div> <div></div> <div>Remove</div>	Merchant Facility Owner
User: Jeff Challis		
User: Joe Acton		

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

Email Alert Edit 2 Save Save & New Cancel

Edit Email Alert

Description: send reminder that Batch Payments Processor has been stopped and should be restarted

Unique Name: send_reminder_that_Batc ⓘ

Namespace Prefix: AAkPay

Installed Package: [AAkPayments](#)

Object: Merchant Facility

Email Template: Batch Payment Schedule ⓘ

Protected Component: ☐

Recipient Type: Search: User ▼ for: Find

Recipients

Available Recipients		Selected Recipients
User: Jeff Challis	1 Add Remove	Merchant Facility Owner
User: Joe Acton		User: Carol Challis

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

Edit Rule Batch Payments Process Restart Reminder

[Help for this Page](#) ⓘ

Step 3: Specify Workflow Actions Step 3 of 3

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria	Evaluation Criteria
(Merchant Facility: cronTriggerBatchId EQUALS null) AND (Merchant Facility: Primary EQUALS True)	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Immediate Workflow Actions

Done

8.1 Select 'Activate' to begin the workflow process

Workflow Rule

Batch Payments Process Restart Reminder

[« Back to List: Workflow Rules](#)

Workflow Rule Detail

[Edit](#) [Delete](#) [Clone](#) [Activate](#)

Rule Name	Batch Payments Process Restart Reminder	Eva
Active	<input type="checkbox"/>	
Description	Remind Payment Administrators if a Batch Payment Processor has been stopped, but not restarted \nUPDATE:\n- Add time based action - 1 day aft rule trigger\n- Send Email: send reminder that Batch Payments Processor has been stopped and shou	


8.2 Set 'Default Workflow User' and Save

Workflow & Approvals Settings

[Help for this Page ?](#)


[Save](#) [Cancel](#)

Specify a default workflow user. Salesforce.com recommends choosing a user with system administrator privileges.

Default Workflow User 

Enabling email approval response lets users reply to email approval requests by typing APPROVE or REJECT in the first line and adding comments in the second line.

Enable Email Approval Response ☐

 By enabling the email approval response feature, you agree to allow salesforce.com to process email approval responses, update approval requests for all active users in your organization, and update the approval object on behalf of your organization's users.

[Save](#) [Cancel](#)

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

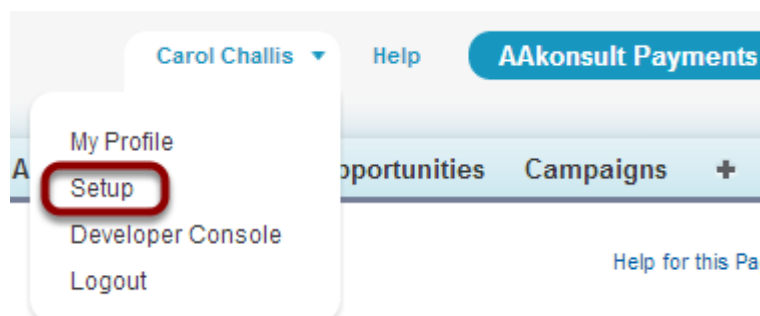
The Batch Payment Processor is started from the "Start" button on the Merchant Facility and processes new transactions every 10 minutes. This workflow is used to notify if the Batch Payments Processor has been started, but for some reason is no longer working. This scenario should never happen, but sometimes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

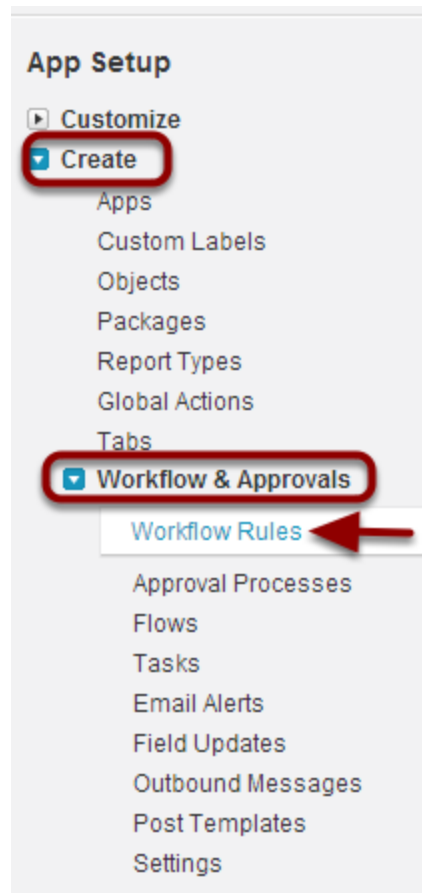
Quick Steps:

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

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.

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

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- :: 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 'Batch Payments Processor Not Running [ADD TIME BASED WORKFLOW]'

Edit Del Activate	 2nd Renewal Reminder	<p>UPDATE: Add Time Based Workflow, 10 days after Subscri - Email Alert: send 2nd Renewal Reminder Email</p> <p>Keep in mind Automatic Renewals</p> <p>Email Contact a reminder that their subscription</p>
Edit Activate	 2nd Renewal Reminder [ADD TIME BASED WORKFLOW]	<p>UPDATE: Add Time Based Workflow, 10 days after Subscri - Email Alert: send 2nd Renewal Reminder Email</p> <p>Keep in mind Automatic Renewals</p>
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]	<p>Advise Payment Administrators if a Batch Payment hours.</p> <p>- Add time based action - 1 day after Last Batch Payment</p> <p>- Send Email: send reminder that Batch Payment</p>
Edit Activate	 Batch Payments Process Restart Reminder [ADD TIME BASED WORKFLOW]	<p>Remind Payment Administrators if a Batch Payment within 24 hours.</p> <p>UPDATE: - Add time based action - 1 day after rule trigger</p> <p>- Send Email: send reminder that Batch Payment</p>
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 specific
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 specific
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 specific
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 specific

This may be located on the second page.

Select 'Clone'

Workflow Rule

Batch Payment Processor Not Running [ADD TIME BASED WORKFLOW] (Manag

[« Back to List: Workflow Rules](#)

This Workflow Rule is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Workflow Rule Detail

Clone

Activate

Rule Name	Batch Payment Processor Not Running [ADD TIME BASED WORKFLOW]	Eval
Namespace Prefix	AAkPay	
Installed Package	AAkPayments	
Active	<input type="checkbox"/>	
Description	Advise Payment Administrators if a Batch Payment Schedule has not successfully run for the last 24 h - Add time based action - 1 day aft Last Batch Processor Run - Send Email: send reminder that Batch Payments Processor has been stopped and shou	
Rule Criteria	(Merchant Facility: cronTriggerBatchId NOT EQUAL TO null) AND (Merchant Facil	
Created By	Jeff Challis , 3/10/2013 6:00 PM	

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

Edit Rule Batch Payment Processor Not Running [ADD TIME BASED WORKFLOW]

[Help for th](#)

Step 2: Configure Workflow Rule 2 **Step**

[Previous](#) **[Save & Next](#)**

Enter the name, description, and criteria to trigger your workflow rule. In the next step, associate workflow actions with this workflow rule.

Edit Rule ! = Required Inf

1

Object

Merchant Facility

Rule Name

Batch Payment Processo

Description

Advise Payment Administrators if a Batch Payment Schedule has not successfully run for the last 24 hours.

3 remaining

Select the 'Add Time Trigger' button

Edit Rule Batch Payment Processor Not Running

Step 3: Specify Workflow Actions

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria	(Merchant Facility: cronTriggerBatchId NOT EQUAL TO null) AND (Mer
Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently m

Immediate Workflow Actions

No workflow actions have been added.

Add Workflow Action ▾

Time-Dependent Workflow Actions [See an example](#)

i No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

Add Time Trigger

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

Add Time Trigger

Merchant Facility

Workflow Time Trigger Edit

Workflow Rule	Batch Payment Processor Not Running			
	1	Days ▾	After ▾	Merchant Facility: Last Batch Processor Run ▾

Save Cancel

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

Edit Rule Batch Payment Processor Not Running

Step 3: Specify Workflow Actions

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria	(Merchant Facility: cronTriggerBatchId NOT EQUAL TO null) AND (Merchant Facility: cronTriggerBatchId NOT EQUAL TO null)
Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Immediate Workflow Actions

No workflow actions have been added.

Add Workflow Action ▼

Time-Dependent Workflow Actions

[See an example](#)

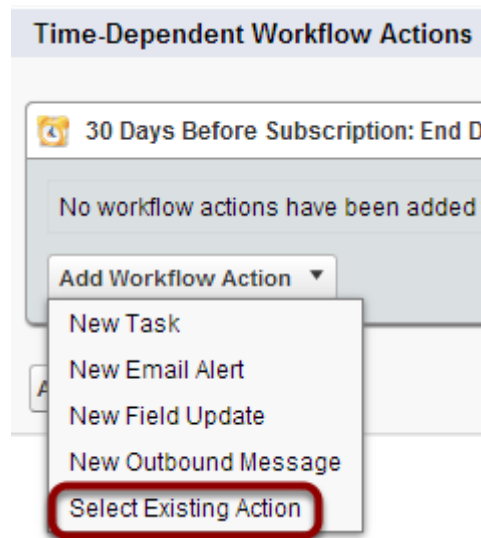
 1 Day After Merchant Facility: Last Batch Processor Run [Edit](#) | [Delete](#)

No workflow actions have been added to this time trigger.

Add Workflow Action ▼

Add Time Trigger

Select 'Select Existing Action' from the drop down menu



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

Select Existing Actions

[Help for this Page](#)

The screenshot displays the "Select Existing Actions" dialog box. At the top, there are "Save" and "Cancel" buttons. Below them, a "Choose Action Type" dropdown menu is set to "Email Alert", which is highlighted with a red rectangle. To the right of this dropdown is a "Search:" field with the text "Email Alert" and a "Find" button. The main area of the dialog is divided into two sections: "Available Actions" and "Selected Actions". The "Available Actions" section contains two entries: "Email Alert: send reminder that Batch Payments Processor has been stopped and should be restarted [UPDATE WHO RECEIVES THIS NOTIFICATION]" and "Email Alert: send reminder that Recurring Payments Processor has been stopped and should be restarted [UPDATE WHO RECEIVES THIS NOTIFICATION]". The "Selected Actions" section is currently empty, showing "--None--". Between the two sections, there are "Add" and "Remove" buttons.

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

Select Existing Actions

SaveCancel

Choose
Action
Type

Search: Email Alert for: Find

Available Actions

Email Alert: send reminder that Recurring Payments Processor has been stopped and should be restarted [UPDATE WHO RECEIVES THIS NOTIFICATION]

1

Add

Remove

2

SaveCancel

Scroll across image to see actions.

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

Edit Rule Batch Payment Processor Not Running

Step 3: Specify Workflow Actions

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria

(Merchant Facility: cronTriggerBatchId NOT EQUAL TO NULL) AND (M

Evaluation Criteria

Evaluate the rule when a record is created, and any time it's edited to subsequently

Immediate Workflow Actions

No workflow actions have been added.

Add Workflow Action

Time-Dependent Workflow Actions

[See an example](#)

🕒 1 Day After Merchant Facility: Last Batch Processor Run

Edit | Delete

Action	Type	Description
<div><div>Edit</div><div>Remove</div></div>	Email Alert	send reminder that Batch Payme NOTIFICATION

Add Workflow Action

Add Time Trigger

Installation Manual

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Page 267

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

Email Alert Edit Save Save & New Cancel

Edit Email Alert


Description

Unique Name 

Namespace Prefix

Installed Package



Object

Email Template 

Protected Component ☐

Recipient Type Search: for: Find

Recipients

Available Recipients		Selected Recipients
User: Carol Challis	<div>Add</div> <div></div> <div></div> <div>Remove</div>	Merchant Facility Owner
User: Jeff Challis		
User: Joe Acton		

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

Email Alert Edit 2 Save Save & New Cancel

Edit Email Alert

Description: send reminder that Batch Payments Processor has been stopped and should be restarted

Unique Name: send_reminder_that_Batc ⓘ

Namespace Prefix: AAkPay

Installed Package: [AAkPayments](#)

Object: Merchant Facility

Email Template: Batch Payment Schedule ⓘ

Protected Component: ☐

Recipient Type: Search: User ▼ for: Find

Recipients

Available Recipients		Selected Recipients
User: Jeff Challis	1 Add Remove	Merchant Facility Owner
User: Joe Acton		User: Carol Challis

Select 'Done' button to complete the workflow rule

Edit Rule Batch Payment Processor Not Running

[Help for this Page](#) ⓘ

Step 3: Specify Workflow Actions Step 3 of 3

Done

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria	(Merchant Facility: cronTriggerBatchId NOT EQUAL TO null) AND (Merchant Facility: Primary EQUALS True)
Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Select 'Activate' to begin the workflow process

Workflow Rule

Batch Payment Processor Not Running

[« Back to List: Workflow Rules](#)

Workflow Rule Detail

[Edit](#) [Delete](#) [Clone](#) [Activate](#)

Rule Name	Batch Payment Processor Not Running	Eva
Active	<input type="checkbox"/>	
Description	Advise Payment Administrators if a Batch Payment Schedule has not successfully run for the last 24 h - Add time based action - 1 day aft Last Batch Processor Run - Send Email: send reminder that Batch Payments Processor has been stopped and shou	
Rule Criteria	Member of Batch Processor Not Running for 24 hours	

Set 'Default Workflow User' and Save

Workflow & Approvals Settings

[Help for this Page ?](#)

[Save](#) [Cancel](#)

Specify a default workflow user. Salesforce.com recommends choosing a user with system administrator privileges.

Default Workflow User

Enabling email approval response lets users reply to email approval requests by typing APPROVE or REJECT in the first line and adding comments in the second line.

Enable Email Approval Response ☐

⚠ By enabling the email approval response feature, you agree to allow salesforce.com to process email approval responses, update approval requests for all active users in your organization, and update the approval object on behalf of your organization's users.

[Save](#) [Cancel](#)

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.

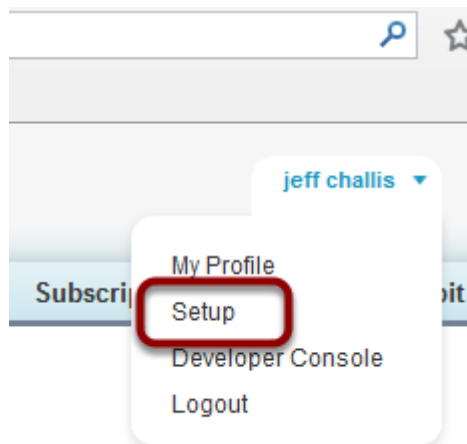
If you wish to have multi-level and more advanced approvals, you can setup Approval Workflows to do this. The final approval step simply needs to do a field update that checks the "Approved" checkbox on the Payment Txn. For setting up Approval workflows, please consult the Salesforce online help, or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

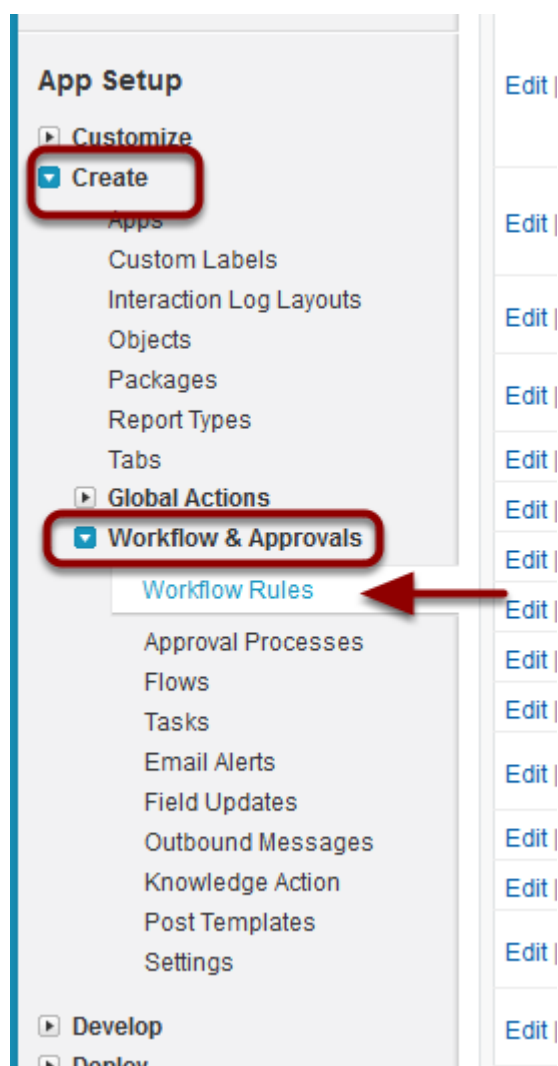
Quick Steps:

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

All Workflow Rules

Configure your organization's workflow by creating workflow rules. 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.

Quick Tips

- [Useful Sam](#)
- [Video Tutori](#)

View: All Workflow Rules [Create New View](#)


A B C D E F G H I J K L M N O P Q R S T U V W			
Action	Rule Name	Description	Object
Edit Deactivate	Recurring Payment Card Expiry	For organisations that need to get their card holders expiry date details for recurring payments, this workflow will remind you of when to follow up.	Recurri Payme
Edit Deactivate	Recurring Payment Error	Should a card be declined during a recurring payment send out an alert to internal staff so they can follow up the reasons for the failure.	Payme
Edit Activate	Recurring Payments Restart Reminder (ADD TIME BASED WORKFLOW)	Remind Payment Administrators if a Recurring Payment Schedule has been stopped, but not restarted within 24 hours UPDATE: Add time based workflow - 1 day after rule trigger - Email Alert: send reminder that Recurring Payments Processor has been st.	Mercha
Edit Activate	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.	Payme
A B C D E F G H I J K L M N O P Q R S T U V W			

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

Workflow Rule

Refund Approval (Managed)

[Back to List: Workflow Rules](#)

 This Workflow Rule is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Workflow Rule Detail

[Clone](#) [Deactivate](#)

Rule Name	Refund Approval	Object	Payment Txn
Namespace Prefix	AAkPay	Evaluation Criteria	Evaluate the rule when : subsequently meet crite
Installed Package	AAkPayments		
Active	<input checked="" type="checkbox"/>		
Description	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.		
Rule Criteria	(Payment Txn: Record Type EQUALS Refund) AND (Payment Txn: Approved EQUALS False) AND (Payment Txn: Status EQUALS Refun		
Created By	jeff challis , 4/10/2014 4:06 PM	Modified By	jeff challis , 19/10/2014 6


Workflow Actions

[Edit](#)

Immediate Workflow Actions

Type	Description
Email Alert	Send Refund Approval Email request

Time-Dependent Workflow Actions [See an example](#)


 You cannot add new time triggers to an active rule. [Deactivate This Rule](#)

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

Edit Email Alert

Send Refund Approval Email request (Managed)

Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an ema

 This Email Alert is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Email Alert Edit

2

SaveSave & NewCancel

Edit Email Alert

Description

Unique Name

Namespace Prefix

Installed Package

Object

Email Template

Protected Component

Send Refund Approval Email request

Send_Refund_Approv

AAkPay

AAkPayments

Payment Txn

Refund Approval

☐

Recipient Type

Recipients

Search: Userfor:Find

1

Available Recipients

User: Test Fulluser

User: jeff challis

Add

Remove

Selected Recipients

Account Owner

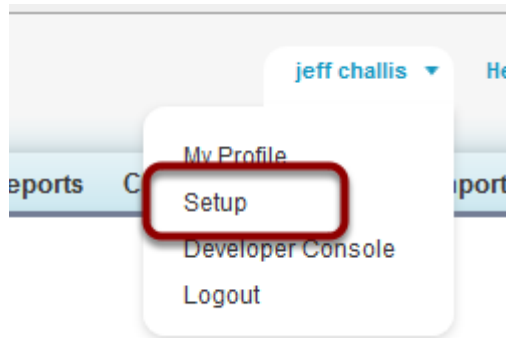
How to activate New Online Payment Notification

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

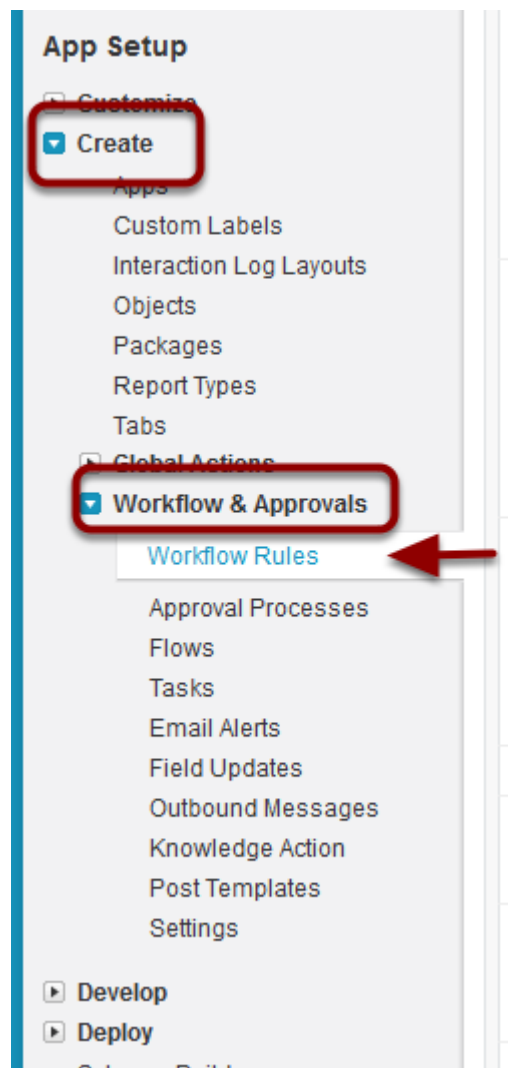
Quick Steps:

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

All Workflow Rules

Configure your organization's workflow by creating workflow rules. 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.

Quick Tips

- [Useful Sample Workflow Rules](#)
- [Video Tutorial \(English Only\)](#)

View: All Workflow Rules [Create New View](#)

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

Action	Rule Name ↑	Description	Object	Active
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 payment has been made and receipting, matching completed. NB: ONLY works when background processor going.	Payment Txn	<input type="checkbox"/>
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 been made (Excluding Memberships as this is a separate workflow notification)	Payment Txn	<input type="checkbox"/>


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

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

Workflow Rule [Help for this Page](#)

New Online Payment Notification (Managed)

[Back to List: Workflow Rules](#)

 This Workflow Rule is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Workflow Rule Detail [Clone](#) [Activate](#)


Rule Name	New Online Payment Notification	Object	Payment Txn
Namespace Prefix	AAkPay	Evaluation Criteria	Evaluate the rule when a record is created, and any time i edited to subsequently meet criteria
Installed Package	AAkPayments		
Active	<input type="checkbox"/>		
Description	UPDATE: - configure who in your organisation is to get this notification. Send an internal notification that a new online payment has been made (Excluding Memberships as this is a separate workflow notification)		
Rule Criteria	(Payment Txn: Status EQUALS Payment Complete) AND (Payment Txn: Payment Type - Type NOT EQUAL TO Membership)		
Created By	jeff challis , 25/10/2014 1:39 PM	Modified By	jeff challis , 25/10/2014 1:39 PM

Workflow Actions [Edit](#)

Immediate Workflow Actions

Type	Description
Email Alert	Send an internal notification that a new online payment has been made

Time-Dependent Workflow Actions [See an example](#)

 No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.


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

Email Alert

[Printable View](#) | [Help for this Page](#) ?

Send an internal notification that a new online payment has been made (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 an internal notification that a new online payment has been made	Email Template	New Online Payment Notification
Unique Name	Send_an_internal_notification_that_a_new_online_payment_has_been_made	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 , 25/10/2014 1:39 PM	Modified By	jeff challis , 25/10/2014 1:39 PM

[Edit](#)[Clone](#)

Rules Using This Email Alert

[Rules Using This Email Alert Help](#) ?

Action	Rule Name	Description	Object	Active
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 been made (Excluding Memberships as this is a separate workflow notification)	Payment Txn	<input type="checkbox"/>


Approval Processes Using This Email Alert

[Approval Processes Using This Email Alert Help](#) ?

6. Update the recipient(s) and Save

Send an internal notification that a new online payment has been made (Managed)

Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing entitlement processes associated with it.

 This Email Alert is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Email Alert Edit 2 Save Save & New Cancel

Edit Email Alert

Description

Unique Name

Namespace Prefix


Installed Package

Object

Email Template

Protected Component


Send an internal notification that a new online payment has been made

Send_an_internal_notif 

AAkPay

AAkPayments


Payment Txn

New Online Payment N 

☐

Recipient Type


Recipients

Search: User  for:

Find


1


Available Recipients

User: Test Fulluser 

User: jeff challis


Add





Remove

Selected Recipients

Account Owner 

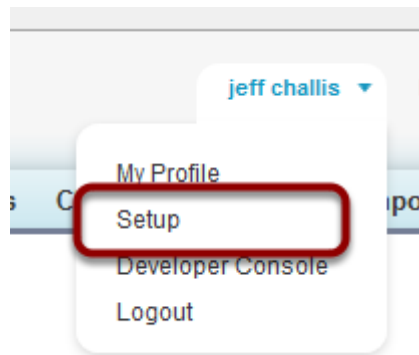
How to activate New Online Membership Payment Notification

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

All Workflow Rules

Help for this Page ?

Configure your organization's workflow by creating workflow rules. 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.

Quick Tips

- Useful Sample Workflow Rules
- Video Tutorial (English Only)

View: All Workflow Rules Create New View

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

Action	Rule Name ↑	Description	Object	Active
<div>Edit Activate</div>	<div>New Online Membership Payment Notification</div>	<div>UPDATE: - configure who in your organisation is to get this notification. Send an internal notification that a new online MEMBERSHIP payment has been made and receipting, matching completed. NB: ONLY works when background processor going.</div>	Payment Txn	<input type="checkbox"/>
<div>Edit Activate</div>	<div>New Online Payment Notification</div>	<div>UPDATE: - configure who in your organisation is to get this notification. Send an internal notification that a new online payment has been made (Excluding Memberships as this is a separate workflow notification)</div>	Payment Txn	<input type="checkbox"/>

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

Installation Manual

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

Workflow Rule

New Online Membership Payment Notification (Managed)

[← Back to List: Workflow Rules](#)

 This Workflow Rule is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Workflow Rule Detail

[Clone](#)

[Activate](#)

Rule Name	New Online Membership Payment Notification	Object	Payment Txn
Namespace Prefix	AAkPay	Evaluation Criteria	Evaluate the rule when a record is edited to subsequently meet
Installed Package	AAkPayments		
Active	<input type="checkbox"/>		
Description	UPDATE: - configure who in your organisation is to get this notification. Send an internal notification that a new online MEMBERSHIP payment has been made and receipting, matching completed. NB: ONLY works when background processor going.		
Rule Criteria	(Payment Txn: Status EQUALS Matching Complete) AND (Payment Txn: Payment Type - Type EQUALS Member:)		
Created By	jeff challis , 25/10/2014 1:39 PM	Modified By	jeff challis , 25/10/2014 1:39 PM

Workflow Actions


[Edit](#)

Immediate Workflow Actions

Type	Description
Email Alert	Send an internal notification that a new online MEMBERSHIP payment has been made

Time-Dependent Workflow Actions

[See an example](#)

 No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

[Edit](#)

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

Email Alert

Printable View | Help for this Page ?

Send an internal notification that a new online MEMBERSHIP payment has been made (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 an internal notification that a new online MEMBERSHIP payment has been made		Email Template	New Online Membership Payment Notification
Unique Name	Send_an_internal_notification_that_a_new_online_MEMBERSHIP_payment_has_been_made		Object	Payment Txn
Namespace Prefix	AAkPay			
Installed Package	AAkPayments			
From Email Address	Current User's email address			
Recipients	User: jeff challis			
Additional Emails				
Created By	jeff challis , 25/10/2014 1:39 PM		Modified By	jeff challis , 25/10/2014 1:39 PM

[Edit](#) [Clone](#)

Rules Using This Email Alert

[Rules Using This Email Alert Help ?](#)

Action	Rule Name	Description	Object	Active
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 payment has been made and receipting, matching completed. NB: ONLY works when background processor going.	Payment Txn	<input type="checkbox"/>

Approval Processes Using This Email Alert


[Approval Processes Using This Email Alert Help ?](#)

6. Update the recipient(s) and Save

Edit Email Alert

Send an internal notification that a new online MEMBERSHIP payment has been made (Managed)

Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert, any modifications will affect all entitlement processes associated with it.

 This Email Alert is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Email Alert Edit 2 Save Save & New Cancel

Edit Email Alert


Description Send an internal notification that a new online MEMBERSHIP payment has been made

Unique Name Send_an_internal_notif [i](#)

Namespace Prefix AAkPay

Installed Package AAkPayments

Object Payment Txn

Email Template New Online Membersh 

Protected Component ☐

Recipient Type Search: User ▼ for: Find

1 **Recipients**

Available Recipients

User: TestFulluser ▲

Add ▶

Remove ◀

Selected Recipients

User: jeff challis ▲

Installation Manual

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Buttons - Optional

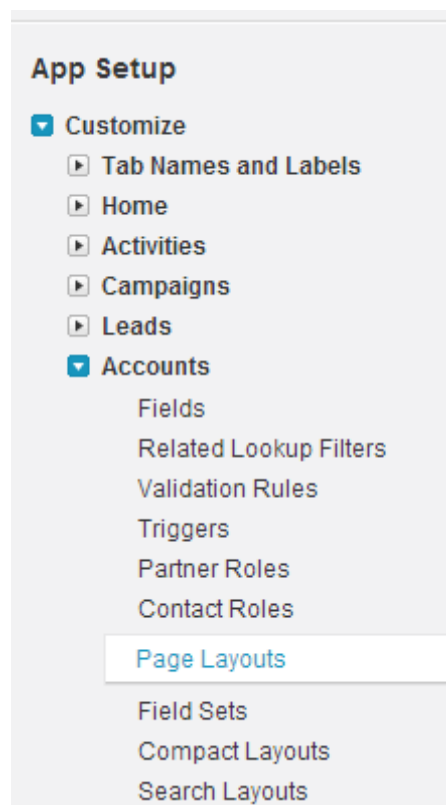
How to create a button on the Accounts tab

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](https://help.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

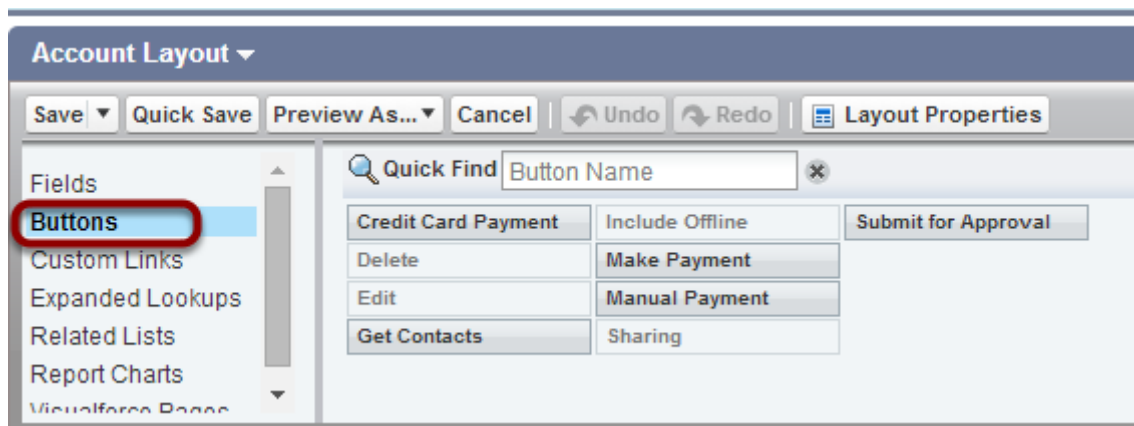
Account Page Layout

This page allows you to create different page layouts to display Account data.

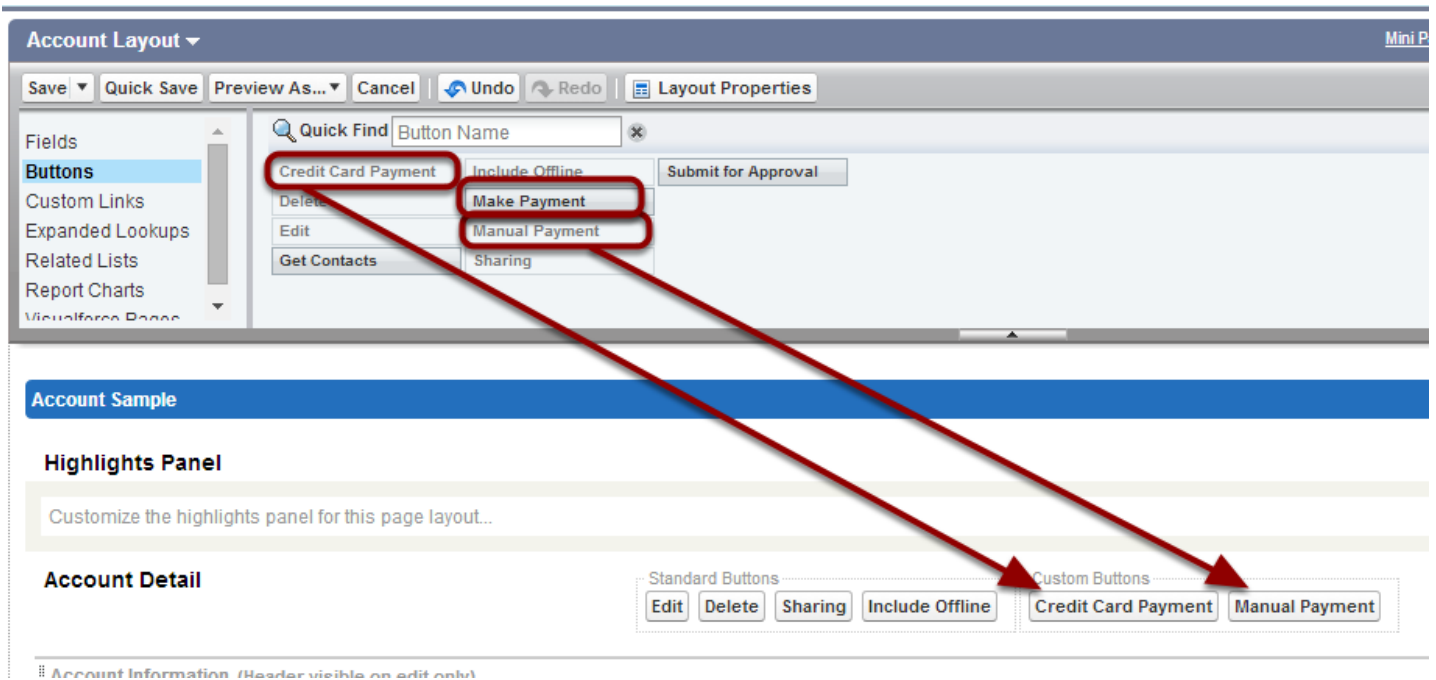
After creating page layouts, click the Page Layout Assignment button to control which page layout users see

Account Page Layouts			New	Page Layout Assignment
Action	Page Layout Name	Created By		
Edit Del	Account (Marketing) Layout	Jeff Challis , 10/05/2013 6:14 PM		
Edit Del	Account (Sales) Layout	Jeff Challis , 10/05/2013 6:14 PM		
Edit Del	Account (Support) Layout	Jeff Challis , 10/05/2013 6:14 PM		
Edit Del	Account Layout	Jeff Challis , 10/05/2013 6:14 PM		

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

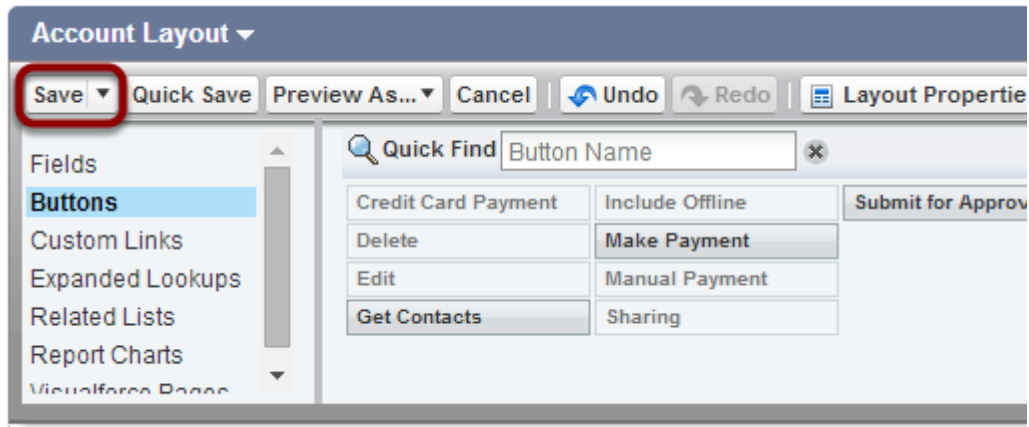


4. Drop & drag the 'Credit Card Payment' and 'Manual Payment' buttons onto the page layout



You can choose buttons to suit.

5. Save



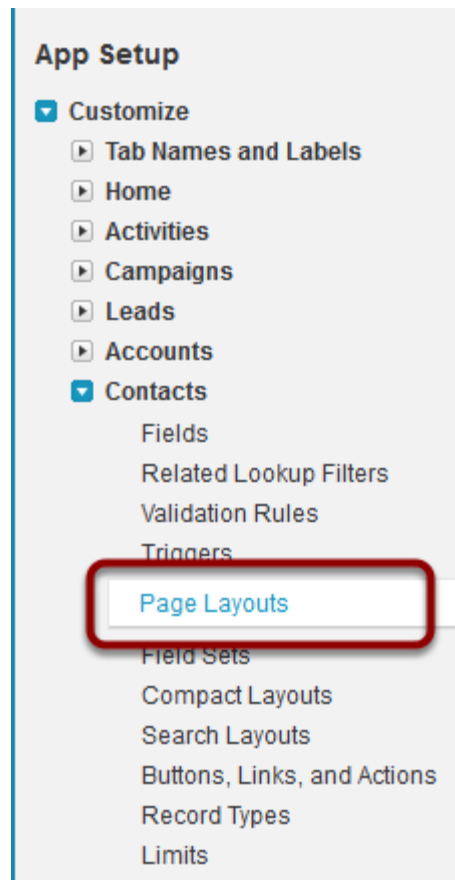
How to create a button on the Contacts tab

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](https://help.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

Contact Page Layout

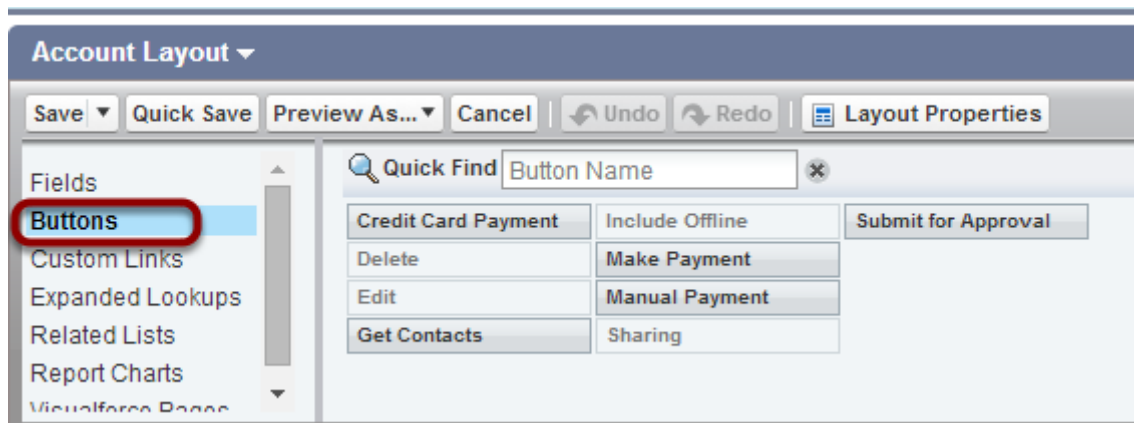
[Help fo](#)

This page allows you to create different page layouts to display Contact data.

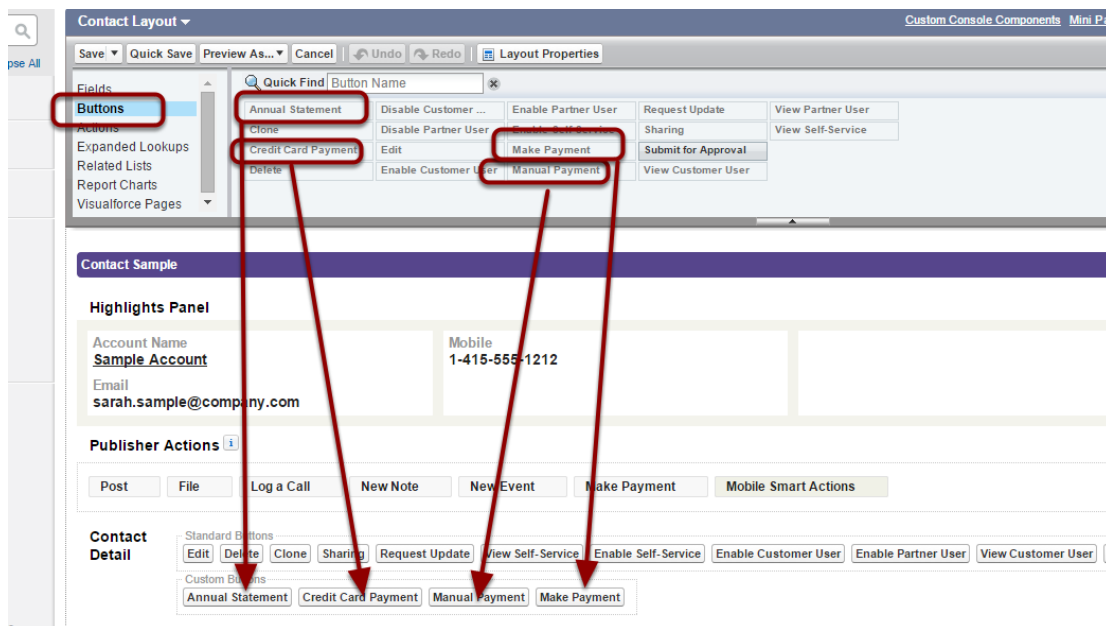
After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

Contact Page Layouts				
		New Page Layout Assignment		
Action	Page Layout Name	Created By	Modified By	
Edit Del	Contact (Marketing) Layout	Jeff Challis , 9/03/2013 7:56 PM	Jeff Challis , 9/03/2013 7:56 PM	
Edit Del	Contact (Sales) Layout	Jeff Challis , 9/03/2013 7:56 PM	Jeff Challis , 9/03/2013 7:56 PM	
Edit Del	Contact (Support) Layout	Jeff Challis , 9/03/2013 7:56 PM	Jeff Challis , 9/03/2013 7:56 PM	
Edit Del	Contact Layout	Jeff Challis , 9/03/2013 7:56 PM	Jeff Challis , 22/09/2014 7:36 PM	

Select 'Buttons' from the list under 'Fields'

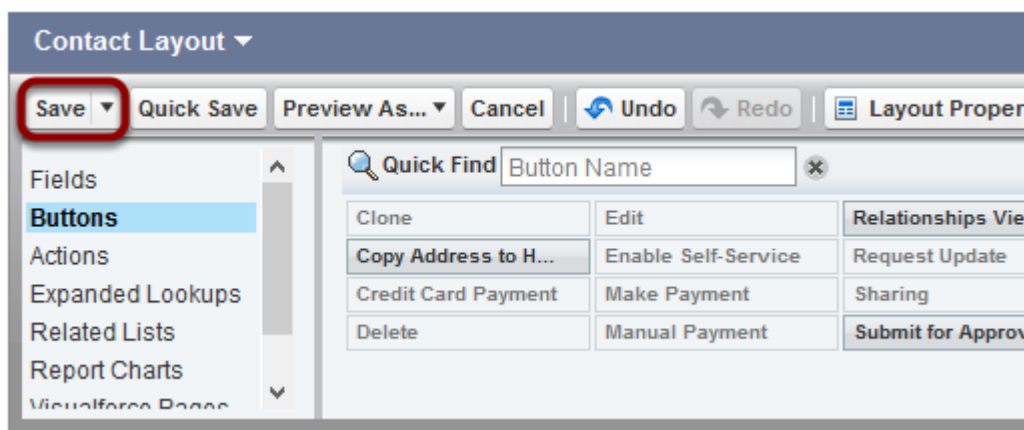


Drop & drag the 'Credit Card Payment' and 'Manual Payment' buttons onto the page layout



You can choose buttons to suit.

Save



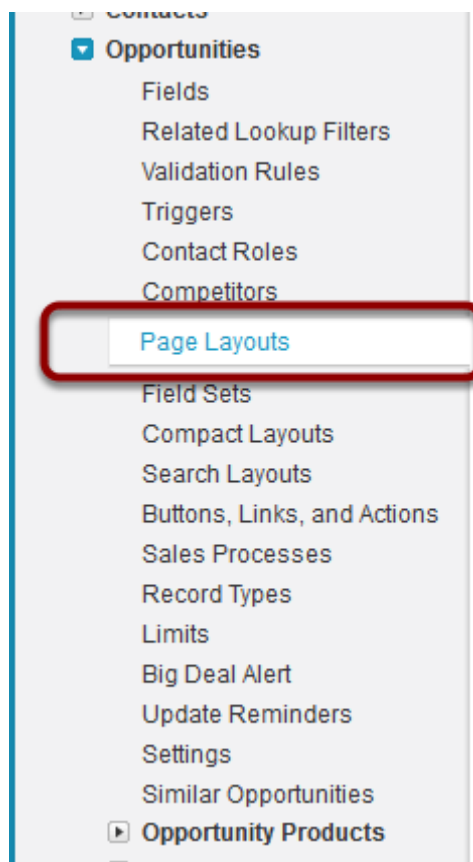
How to create a button on the Opportunity tab

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](https://help.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

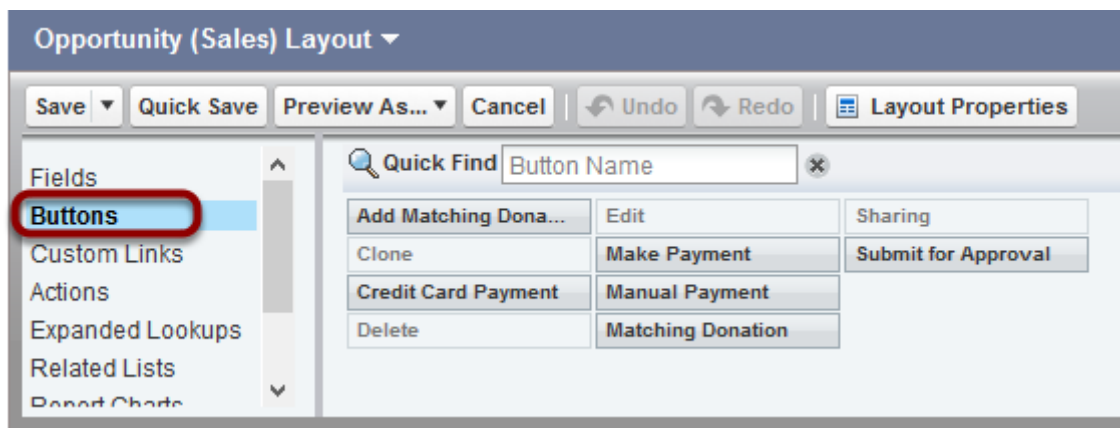
Opportunity Page Layout

This page allows you to create different page layouts to display Opportunity data.

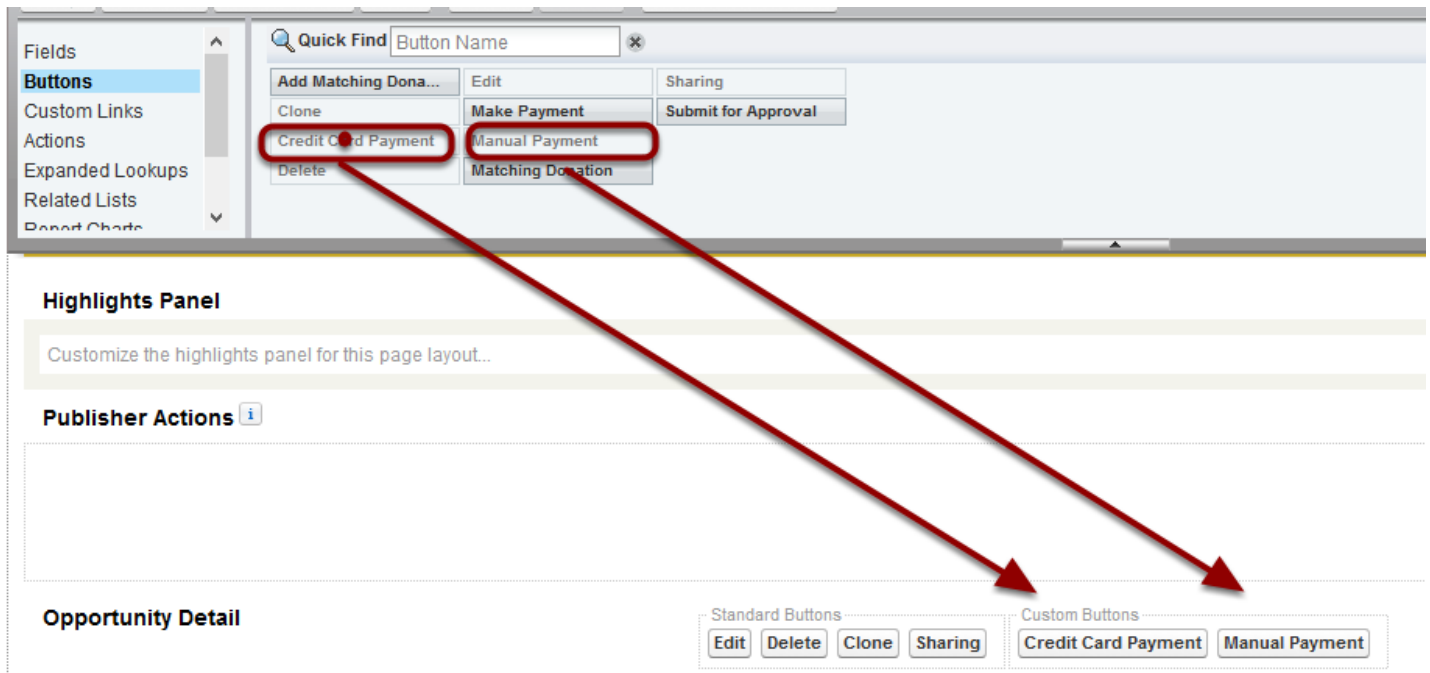
After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

Opportunity Page Layouts				New	Page Layout Assignment
Action	Page Layout Name	Installed Package	Create		
Edit Del	AAkPayments Opportunity Layout	AAkPayments	Jeff Cl		
Edit Del	Opportunity (Marketing) Layout		Jeff Cl		
Edit Del	Opportunity (Sales) Layout		Jeff Cl		
Edit Del	Opportunity (Support) Layout		Jeff Cl		
Edit Del	Opportunity Layout		Jeff Cl		

Select 'Buttons' from the list under 'Fields'

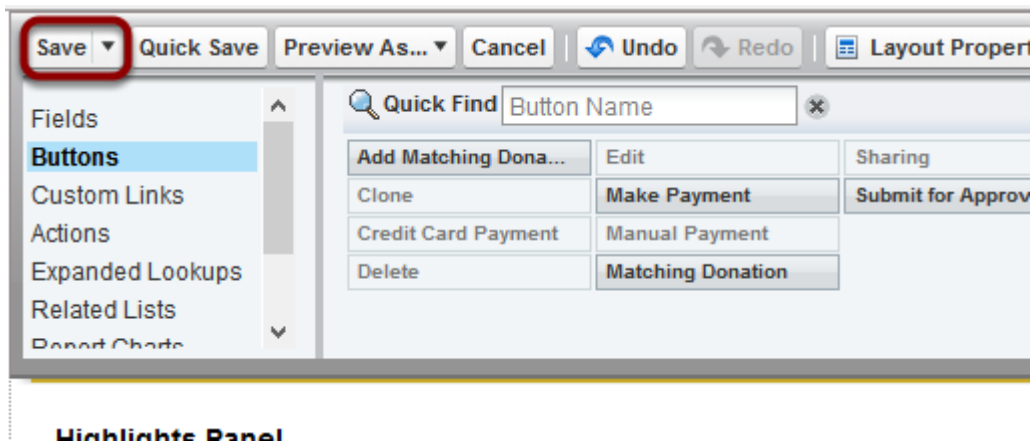


Drop & drag the 'Credit Card Payment' and 'Manual Payment' buttons onto the page layout



You can choose buttons to suit.

Save



How to create a button on the Campaign tab

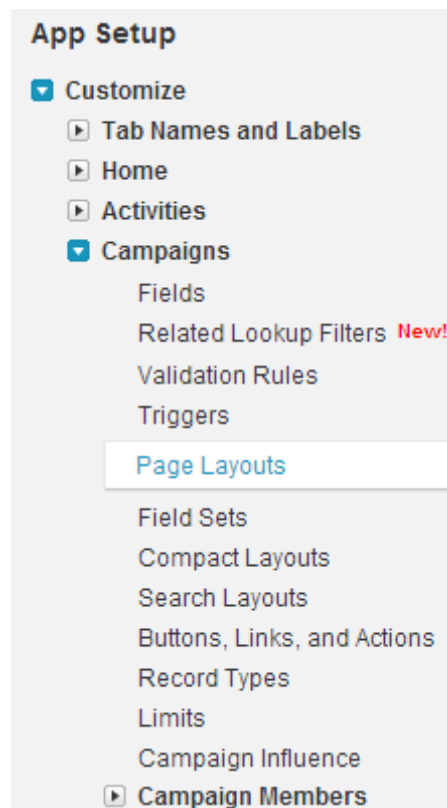
Cash, Cheque, Money Orders and Credit Card payment buttons are available for Accounts, Contacts, Opportunities and Campaign Members tabs. For other objects and custom objects, custom buttons can be created by administrators. To see how to do this, please see the [salesforce.com](https://help.salesforce.com)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



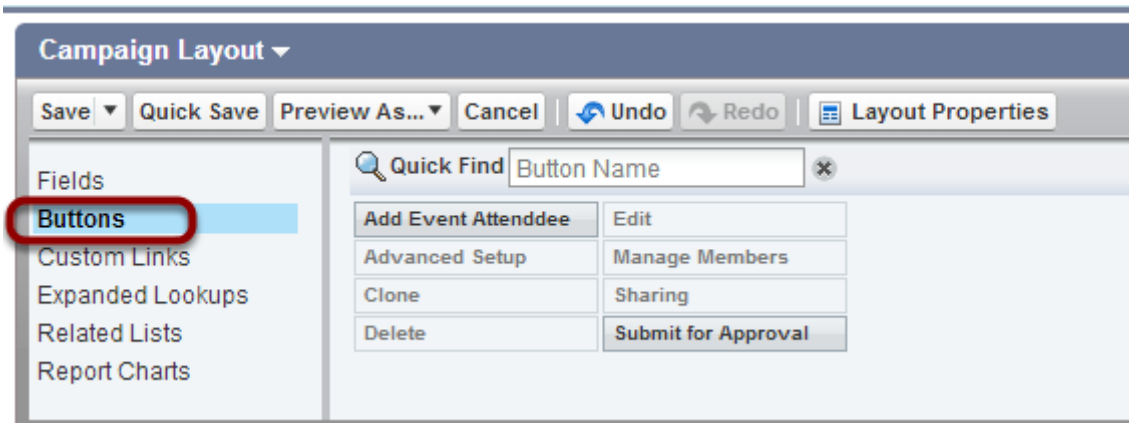
2. Select 'Edit' next to the page layout that you would like to add the buttons to

Campaign Page Layout

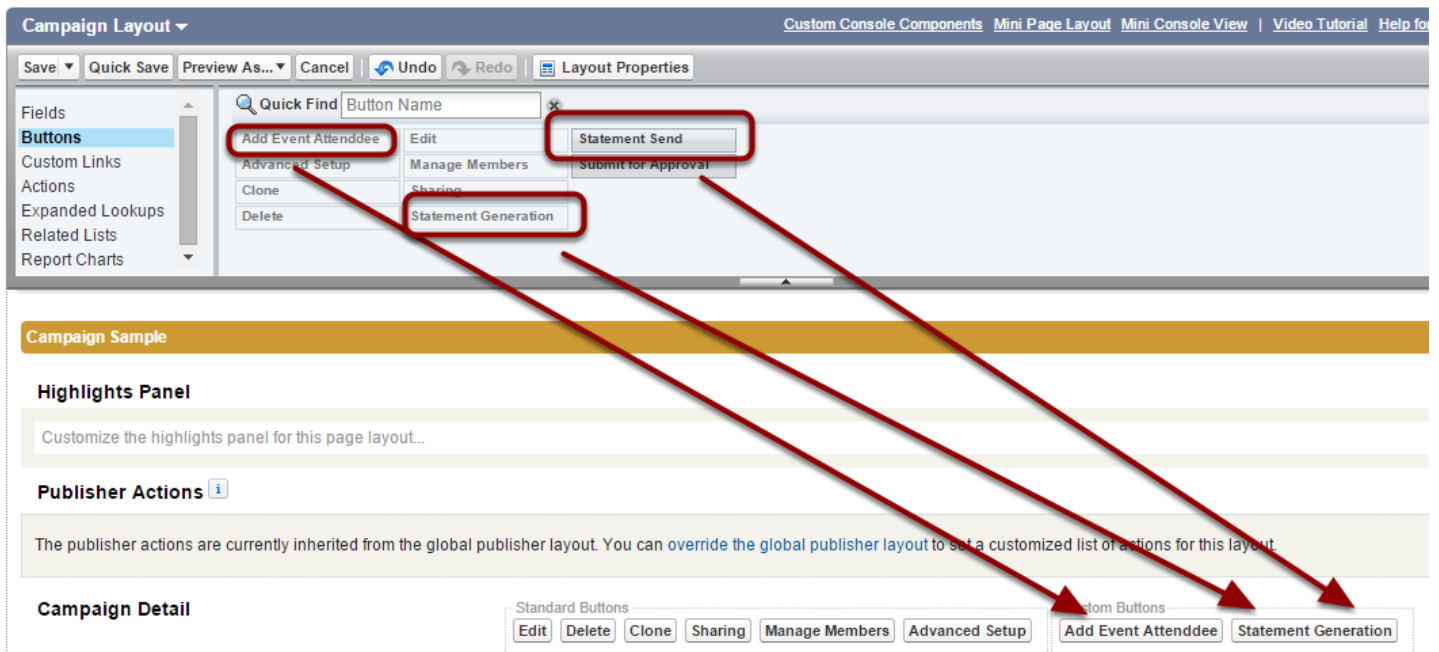
This page allows you to create different page layouts to display Campaign data.
After creating page layouts, click the Page Layout Assignment button to control which page layout users see

Campaign Page Layouts				New Page Layout Assignment	
Action	Page Layout Name	Installed Package			
Edit Del	AAkPayments Campaign Layout	AAkPayments			
Edit Del	Campaign Layout				

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



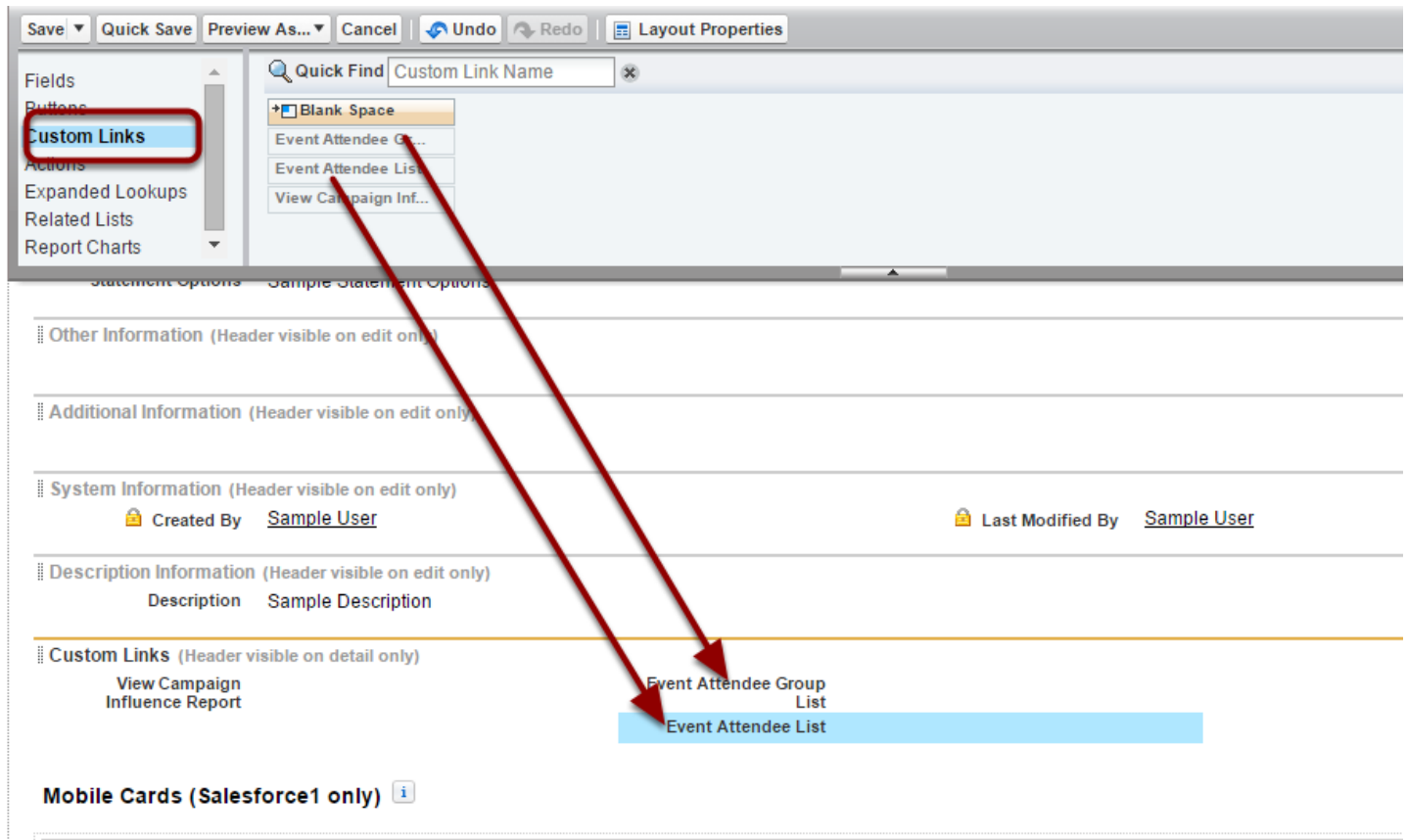
4. Drop & drag the buttons onto the page layout



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



Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields
Buttons
Custom Links
Actions
Expanded Lookups
Related Lists
Report Charts

Quick Find Custom Link Name

- Blank Space
- Event Attendee G...
- Event Attendee List
- View Campaign Inf...

Statement Options Sample Statement Options

Other Information (Header visible on edit only)

Additional Information (Header visible on edit only)

System Information (Header visible on edit only)

Created By Sample User Last Modified By Sample User

Description Information (Header visible on edit only)

Description Sample Description

Custom Links (Header visible on detail only)

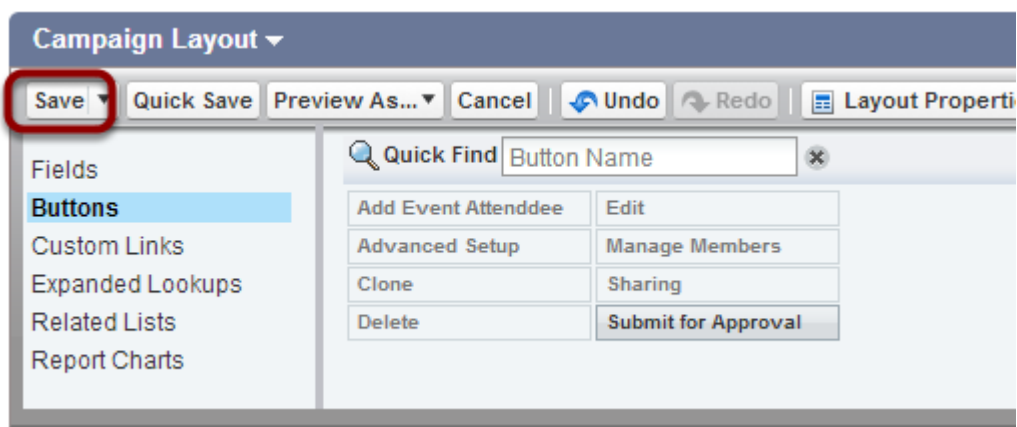
View Campaign
Influence Report

Event Attendee Group
List
Event Attendee List

Mobile Cards (Salesforce1 only) i

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

6. Save



Campaign Layout

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields
Buttons
Custom Links
Expanded Lookups
Related Lists
Report Charts

Quick Find Button Name

Add Event Attendee	Edit
Advanced Setup	Manage Members
Clone	Sharing
Delete	Submit for Approval

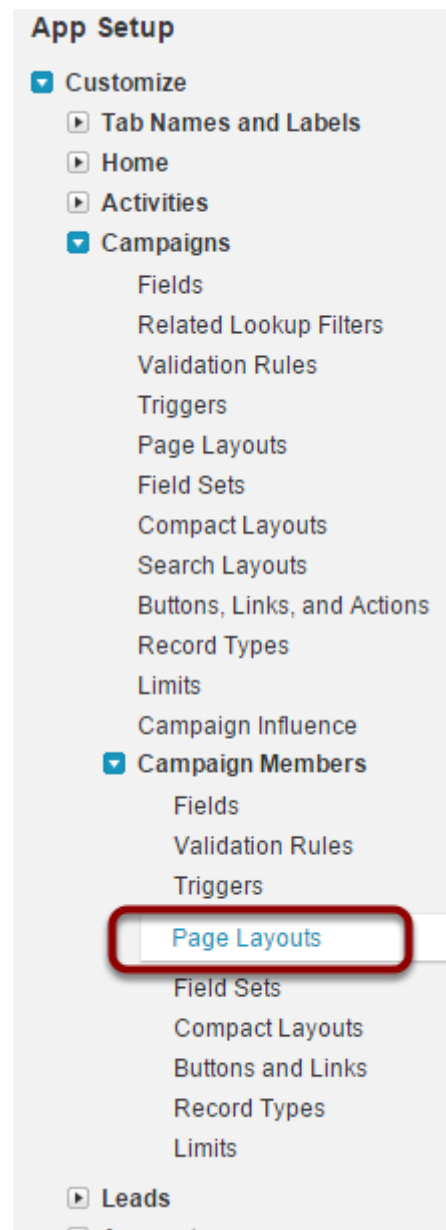
How to create a button on the Campaign Member

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

Campaign Member Page Layout

This page allows you to create different page layouts to display Campaign Member data.
After creating page layouts, click the Page Layout Assignment button to control which page layout is assigned to a campaign.

Campaign Member Page Layouts			New	Page Layout Assignment
Action	Page Layout Name	Created By		
Edit Del	Campaign Member Page Layout	Jeff Challis		

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

Campaign Member Page Layout

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

- Buttons**
- Expanded Lookups
- Report Charts
- Visualforce Pages

Quick Find Button Name

Annual Statement	Credit Card Payment
Clone	Delete
Convert Lead	Edit
Create Opportunity	Manual Payment

4. Drop & drag buttons onto the page layout

The screenshot shows the 'Campaign Member Page Layout' editor. On the left, a sidebar lists 'Fields', 'Buttons', 'Expanded Lookups', 'Report Charts', and 'Visualforce Pages'. The 'Buttons' section is highlighted. In the center, a 'Quick Find' search bar is above a table of buttons: 'Annual Statement', 'Credit Card Payment', 'Clone', 'Delete', 'Convert Lead', 'Edit', 'Create Opportunity', and 'Manual Payment'. Three red arrows originate from these buttons and point to the 'Custom Buttons' section on the right. This section contains a row of buttons: 'Edit', 'Delete', 'Clone', 'Convert Lead', 'Create Opportunity', 'Annual Statement', 'Credit Card Payment', and 'Manual Payment'. Below this, the 'Campaign Member Detail' section is visible, showing a header for 'Campaign Member Information' and a list of fields: 'Campaign' (Sample Campaign) and 'Contact' (Sample Contact). The bottom right corner indicates 'Blank Space'.

5. Save

The screenshot shows the same 'Campaign Member Page Layout' editor. The 'Save' button in the top-left toolbar is highlighted with a red box. The rest of the interface, including the sidebar, button palette, and layout preview, remains the same as in the previous screenshot.

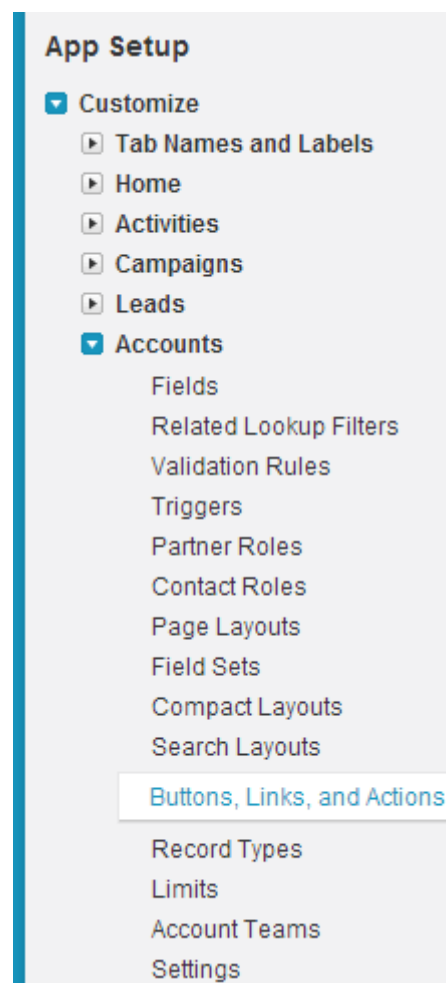
How to create a credit card button on the Persons Account tab

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?ald={!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

Account Custom Button or Link

New Button or Link

Custom Button or Link Edit
[Save](#)
[Quick Save](#)
[Preview](#)
[Cancel](#)

Label

Name

Description

Display Type

☒ Detail Page Link [View example](#)
☐ Detail Page Button [View example](#)
☐ List Button [View example](#)

Behavior

Display in new window

[View Behavior Options](#)

Content Source

URL

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

Account Custom Button or Link

New Button or Link

Custom Button or Link Edit

Save

Quick Save

Preview

Cancel

Label

New Credit Card Payment

Name

New_Credit_Card_Payme [i](#)

Description

Made up button for an example

Display Type

☒ Detail Page Link [View example](#)
☐ Detail Page Button [View example](#)
☐ List Button [View example](#)

Behavior

Display in new window [View Behavior Options](#)

Content Source

URL

Select Field Type

Account

Insert Field

-- Insert Merge Field --

Insert Operator

Functions

-- All Function

ABS

AND

BEGINS

BLANKVALUE

CASE

CASESAFEID

Insert Selected

```

/apex/AAkPay__checkout?aId={!Account.Id}&MailingStreet=
{!Account.PersonMailingStreet}&MailingState={!Account.PersonMailingState}&MailingCity=
{!Account.PersonMailingCity}&MailingPostalCode=
{!Account.PersonMailingPostalCode}&MailingCountry=
{!Account.PersonMailingCountry}&Phone={!Account.Phone}&firstName=
{!Account.FirstName}&LastName={!Account.LastName}&MobilePhone=
{!Account.PersonMobilePhone}&Phone={!Account.Phone}&Email={!Account.PersonEmail}

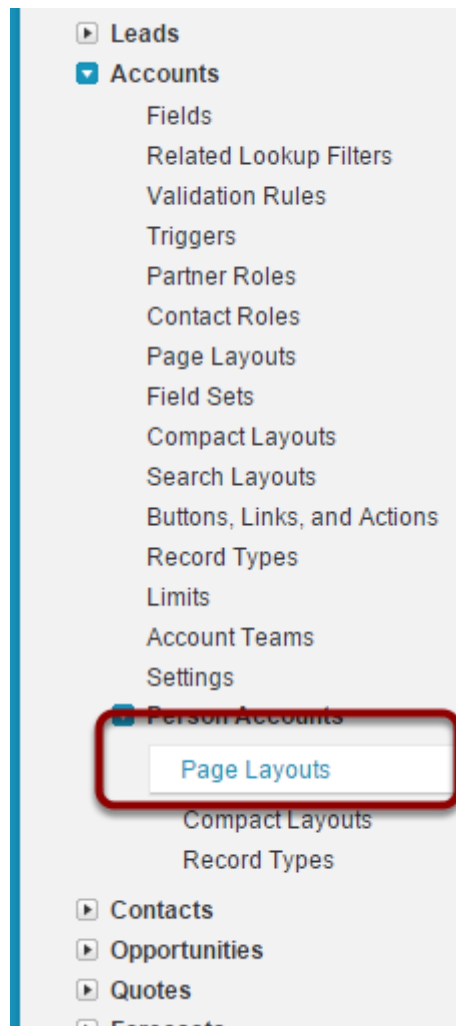
```

/apex/

AAkPay__checkout?ald={!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'

Person Account Page Layout

This page allows you to create different page layouts to display Person Account data. After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

Person Account Page Layouts			
		New	Page Layout Assignment
Action	Page Layout Name	Created By	Modified By
Edit Del	Person Account Layout	Jeff Challis, 19/05/2011 11:42 AM	Automated Proc

Drop and drag the buttons into the page layout

Person Account Layout Custom Console Components Mini Page Layout Mini Console View

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Button Name

Credit Card Payment	Disable Partner A...	Enable Self-Service	Manual Payment	Submit for Approval
Credit Card Payment...	Edit	Get Contacts	Manual Payment PA	View Customer User
Delete	Enable As Partner	Include Offline	Request Update	View Self-Service
Disable Customer ...	Enable Customer User	Make Payment	Sharing	

Person Account Sample

Highlights Panel
Customize the highlights panel for this page layout...

Publisher Actions ⓘ
The publisher actions are currently inherited from the global publisher layout. You can override the global publisher layout to set a customized list of actions for this layout.

Person Account Detail

Standard Buttons: Edit Delete Sharing Include Offline Request Update View Self-Service Enable Self-Service Enable As Partner Enable Customer User View Customer User Disable Customer Ac

Custom Buttons: Manual Payment Credit Card Payment

Save

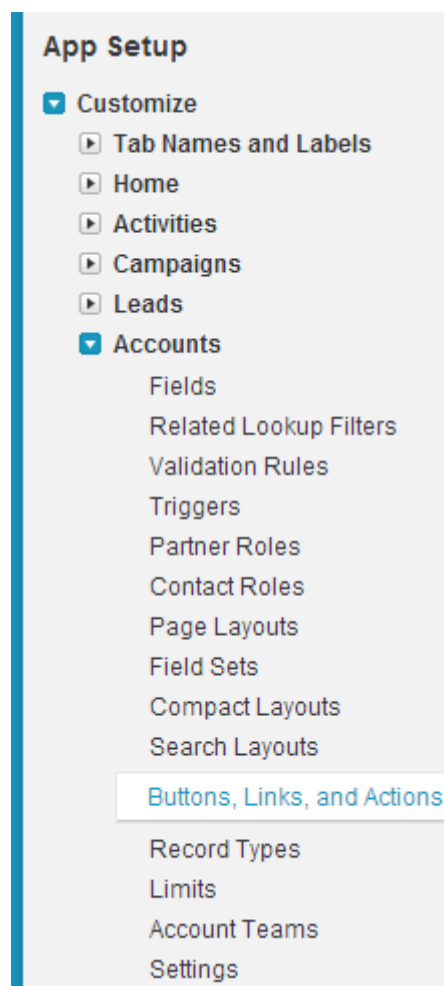
How to create a manual payment button on the Persons Account tab

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?ald={!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

Account Custom Button or Link

New Button or Link

Custom Button or Link Edit
[Save](#)
[Quick Save](#)
[Preview](#)
[Cancel](#)

Label

Name

Description

Display Type

☒ Detail Page Link [View example](#)
☐ Detail Page Button [View example](#)
☐ List Button [View example](#)

Behavior
[View Behavior Options](#)

Content Source

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

Account Custom Button or Link
New Button or Link

Custom Button or Link Edit Save Quick Save Preview Cancel

Label

Name [i](#)

Description

Display Type
☒ Detail Page Link [View example](#)
☐ Detail Page Button [View example](#)
☐ List Button [View example](#)

Behavior [View Behavior Options](#)

Content Source

Select Field Type Insert Field Insert Operator

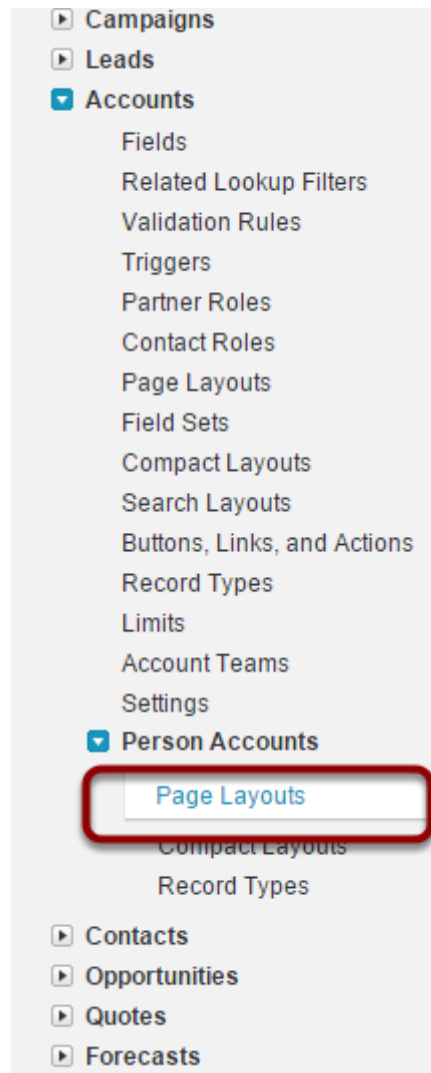
Functions

/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'

Home About AAkonsult Payments Merchant Facilities Payment Txn's Manual Payments Recurring Payments Subscription Gr

Search All Setup...  

[Expand All](#) | [Collapse All](#)

Salesforce1 Setup New!

Force.com Home

System Overview

Personal Setup

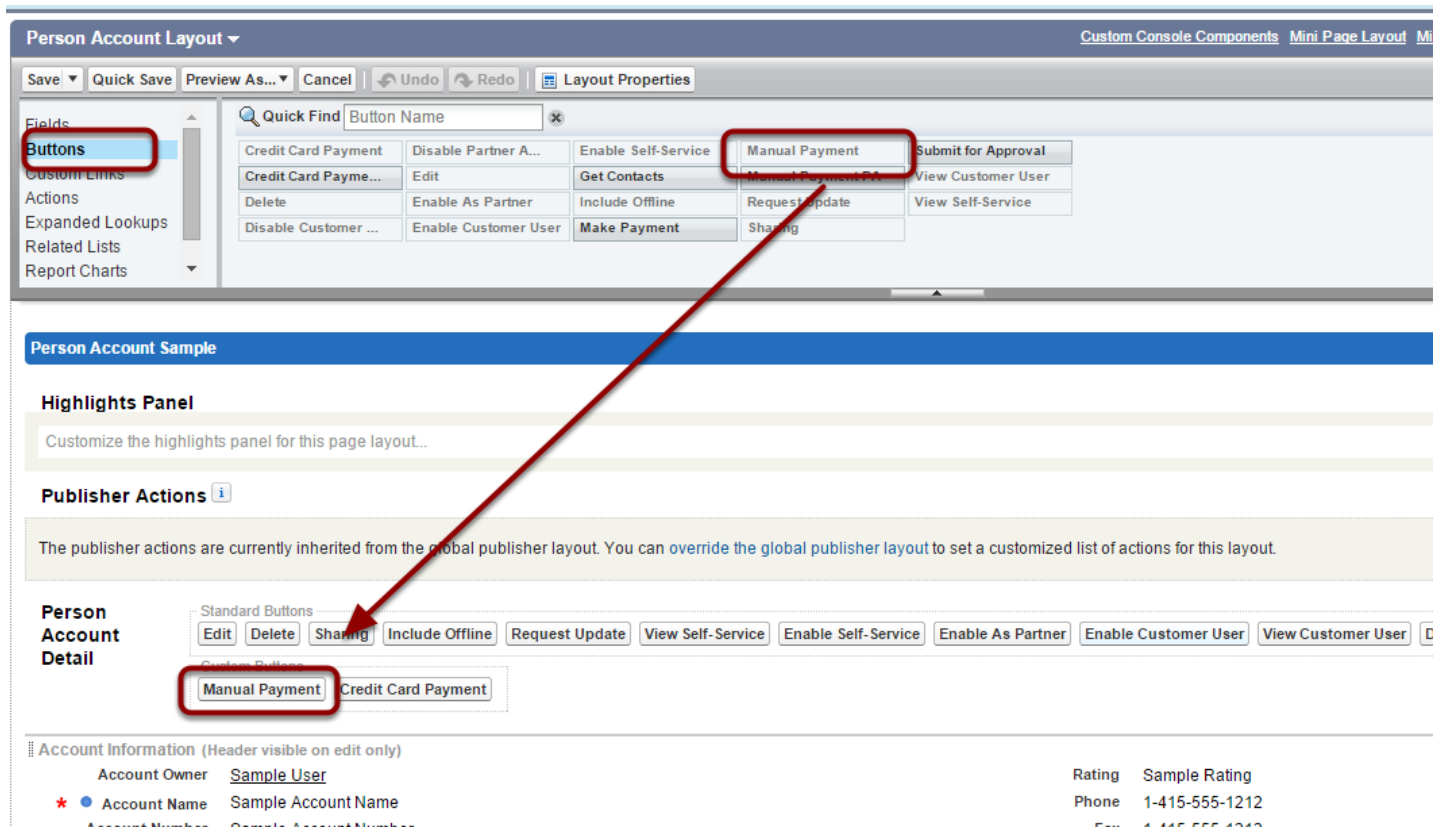
Person Account Page Layout

This page allows you to create different page layouts to display Person Account data. After creating page layouts, click the Page Layout Assignment button to control which page layout users see by

Person Account Page Layouts		
Action	Page Layout Name	Created By
Edit Del	Person Account Layout	Jeff Challis , 19/05/2011 11:42 AM

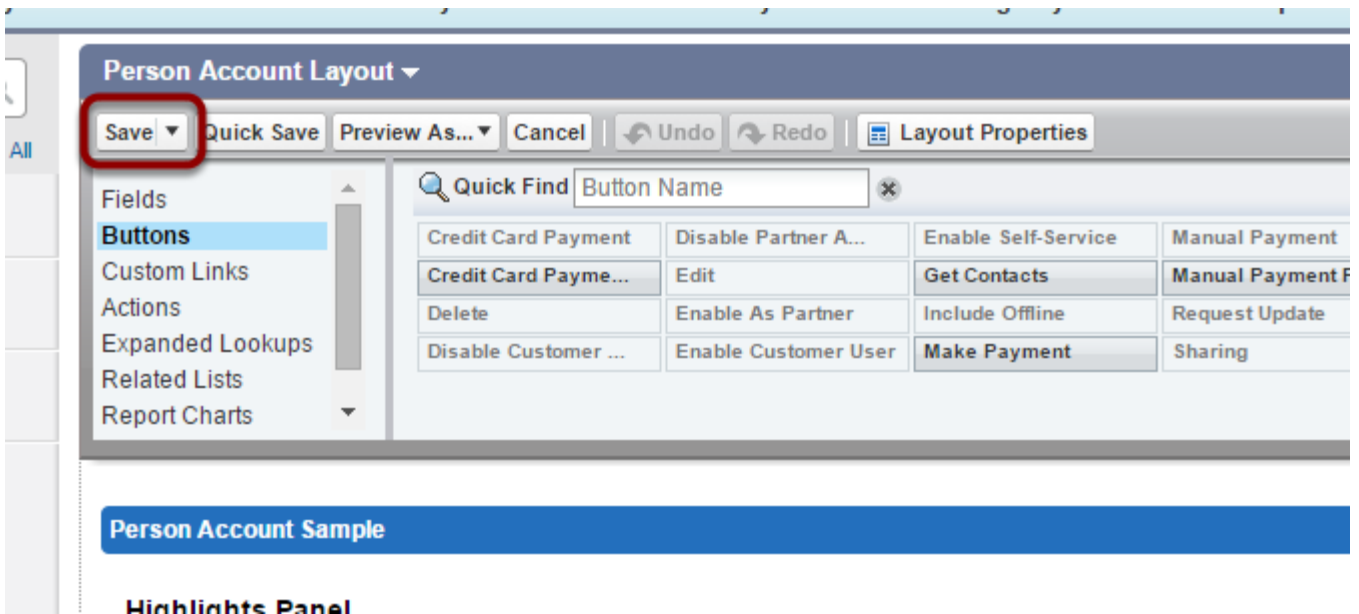
[New](#) [Page Layout Assignment](#)

5.3 Drop and drag the buttons into the page layout



The screenshot shows the 'Person Account Layout' editor. On the left, a sidebar lists 'Fields', 'Buttons', 'Custom Links', 'Actions', 'Expanded Lookups', 'Related Lists', and 'Report Charts'. The 'Buttons' section is highlighted. In the center, a 'Quick Find' search bar is above a grid of buttons. A red box highlights the 'Manual Payment' button in the grid. A red arrow points from this button to the 'Publisher Actions' section below. In the 'Publisher Actions' section, a red box highlights the 'Manual Payment' button in the 'Custom Buttons' area. Below this, the 'Person Account Detail' section shows a list of buttons: 'Edit', 'Delete', 'Sharing', 'Include Offline', 'Request Update', 'View Self-Service', 'Enable Self-Service', 'Enable As Partner', 'Enable Customer User', and 'View Customer User'. The 'Manual Payment' button is also present in this list.

5.4 Save



The screenshot shows the 'Person Account Layout' editor. The 'Save' button in the top toolbar is highlighted with a red box. The toolbar also includes 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. The sidebar on the left shows 'Fields', 'Buttons', 'Custom Links', 'Actions', 'Expanded Lookups', 'Related Lists', and 'Report Charts'. The 'Buttons' section is highlighted. The main area shows a 'Quick Find' search bar and a grid of buttons. Below the grid, the 'Person Account Sample' section is visible, followed by the 'Highlights Panel'.

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

Edit Lead Custom Button or Link Help for this Page ?

Credit Card Payment

Custom Button or Link Edit
Save Quick Save Preview Cancel

Save was successful.

Label
Name ⓘ
Description

Display Type
☐ Detail Page Link [View example](#)
☒ Detail Page Button [View example](#)
☐ List Button [View example](#)

Behavior [View Behavior Options](#)

Content Source

Select Field Type
Insert Field
Insert Operator

Functions

ⓘ

Link Encoding

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)

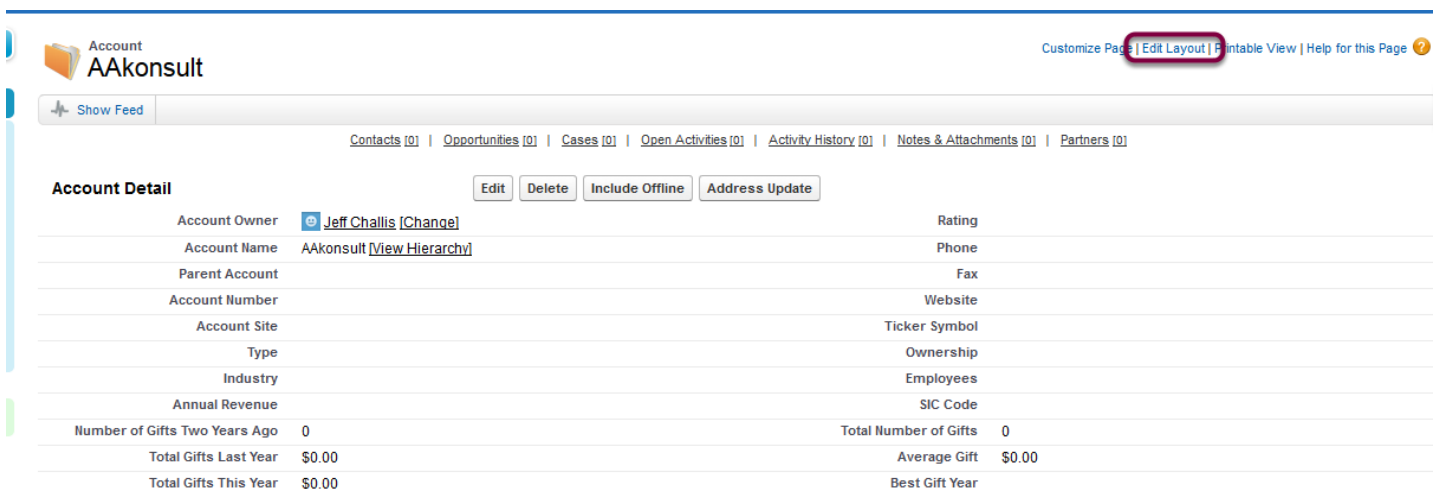
Make Payment Button provides a launch pad for four existing functions. These are:

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



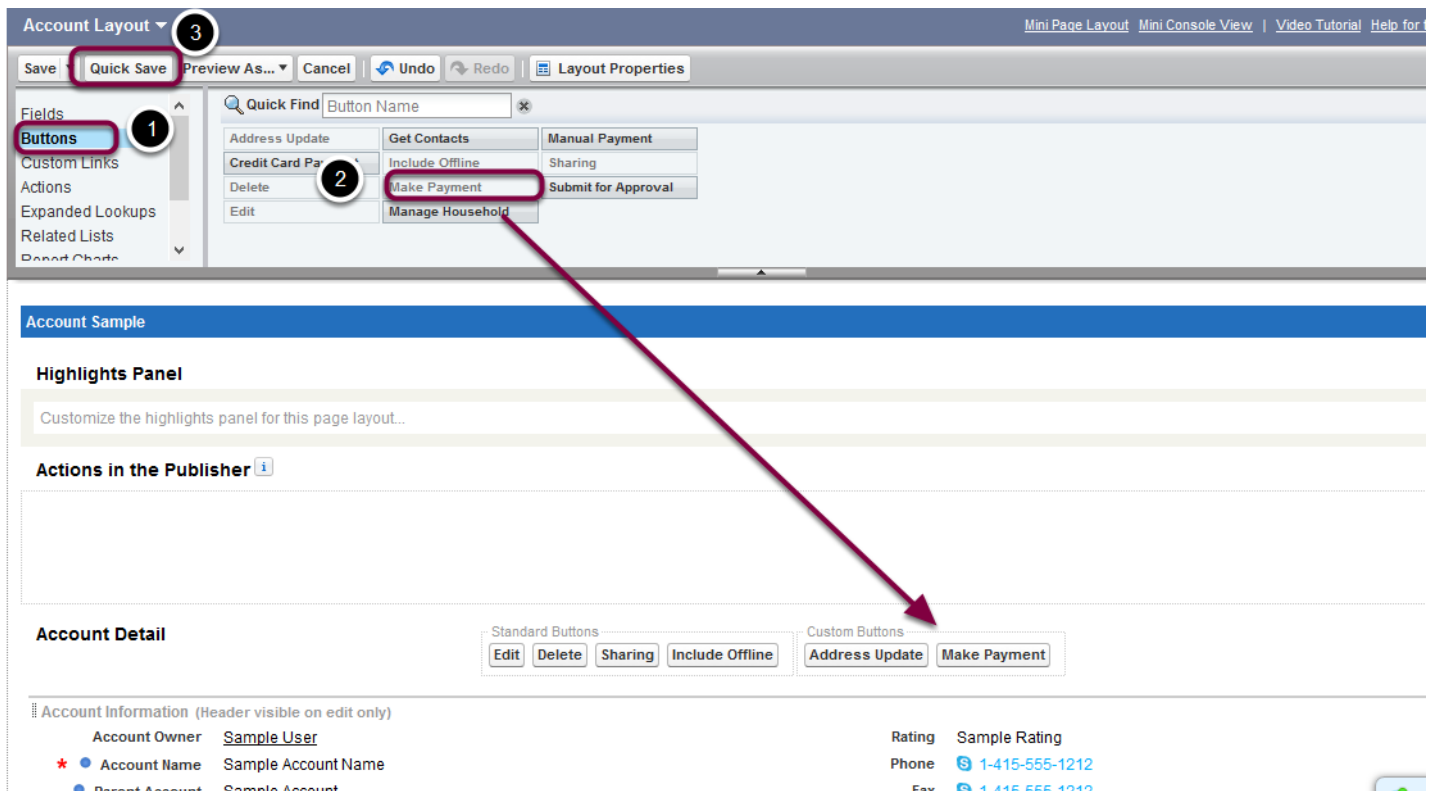
The screenshot shows the AAkonsult Account Detail page. At the top right, there are links: [Customize Page](#), [Edit Layout](#) (highlighted with a red box), [Printable View](#), and [Help for this Page](#). Below the header, there is a navigation bar with links: [Contacts \[0\]](#), [Opportunities \[0\]](#), [Cases \[0\]](#), [Open Activities \[0\]](#), [Activity History \[0\]](#), [Notes & Attachments \[0\]](#), and [Partners \[0\]](#). The main content area is titled 'Account Detail' and includes buttons: [Edit](#), [Delete](#), [Include Offline](#), and [Address Update](#). The account details are displayed in a table format:

Account Owner	Jeff Challis [Change]	Rating	
Account Name	AAkonsult [View Hierarchy]	Phone	
Parent Account		Fax	
Account Number		Website	
Account Site		Ticker Symbol	
Type		Ownership	
Industry		Employees	
Annual Revenue		SIC Code	
Number of Gifts Two Years Ago	0	Total Number of Gifts	0
Total Gifts Last Year	\$0.00	Average Gift	\$0.00
Total Gifts This Year	\$0.00	Best Gift Year	

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

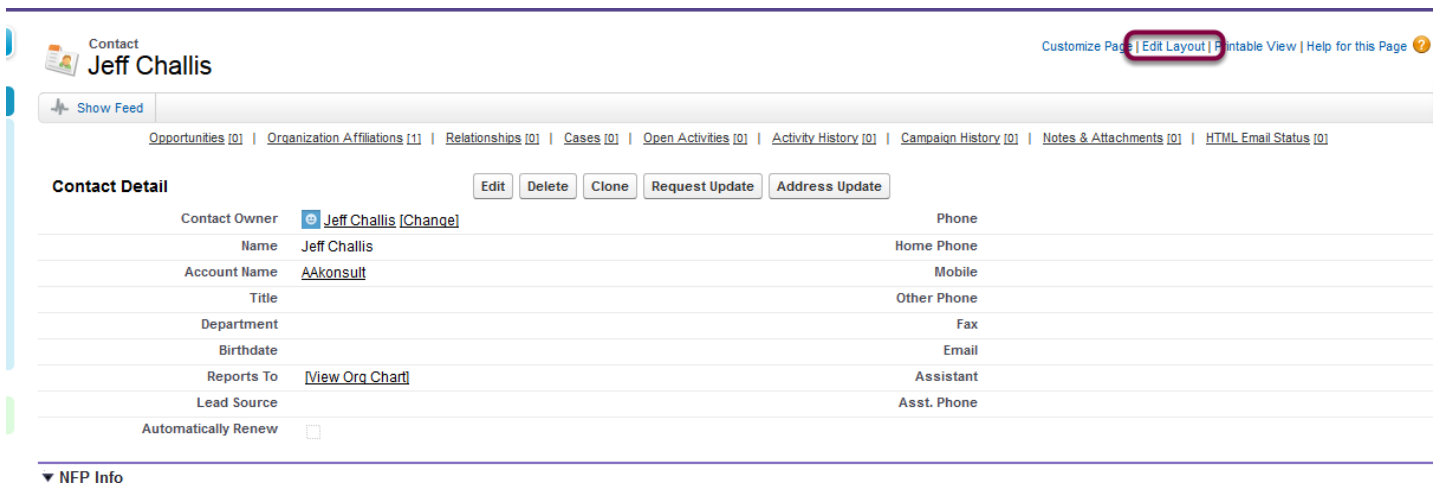
Alternatively, navigate to setup > Customize > Accounts > Page Layouts. Click edit next to the layout you wish to edit.

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

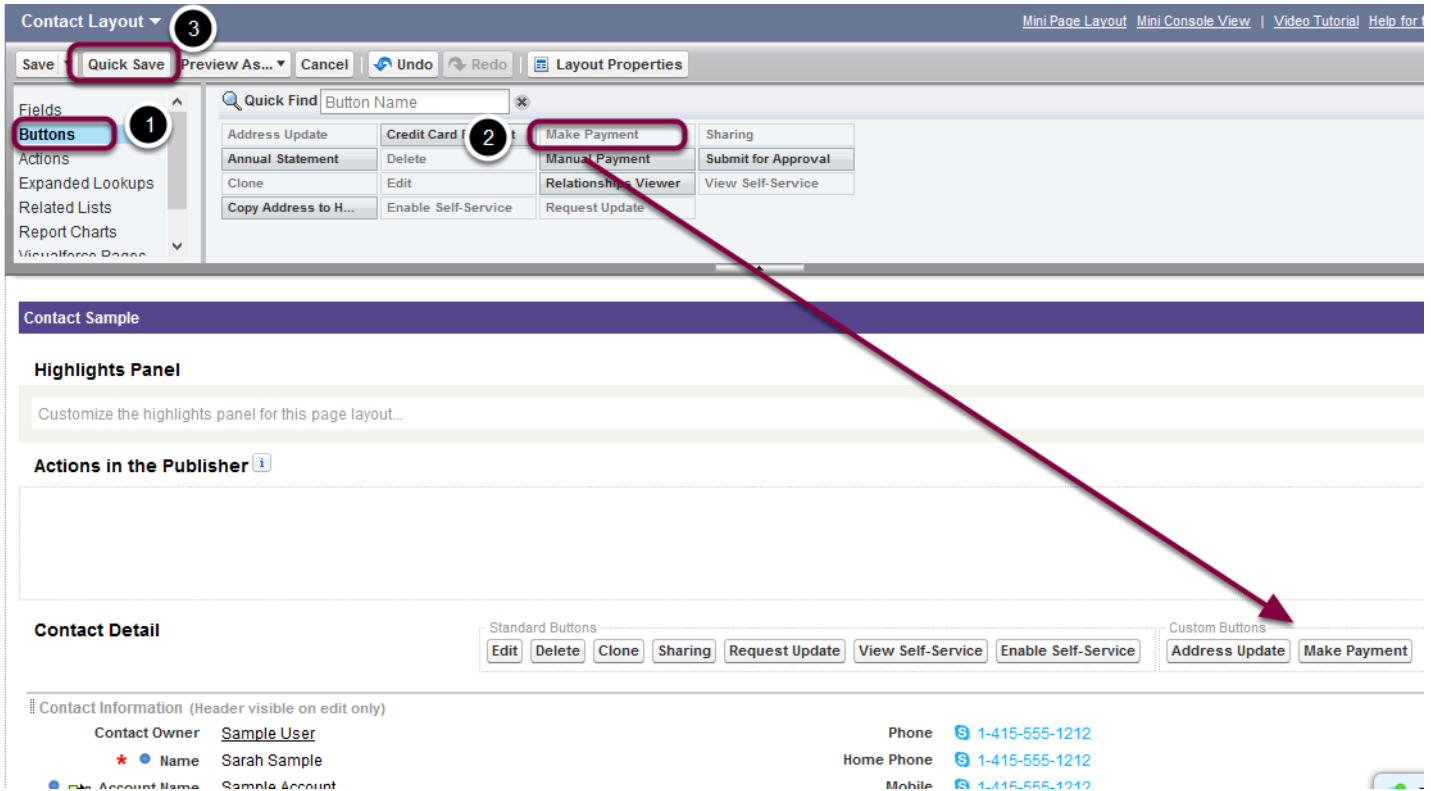
2. Adding Make Payments Button to Contacts



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



The screenshot shows the AAKonsult interface for editing a contact layout. The 'Contact Layout' header is at the top. Below it, there's a 'Buttons' sidebar on the left with a 'Quick Find' search bar. The 'Buttons' sidebar is highlighted with a red box and a circled '1'. The 'Quick Find' search bar is highlighted with a red box and a circled '2'. The 'Make Payment' button is highlighted with a red box and a circled '3'. A red arrow points from the 'Make Payment' button in the sidebar to the 'Make Payment' button in the 'Custom Buttons' section of the 'Contact Detail' panel.

Contact Layout Mini Page Layout Mini Console View | Video Tutorial Help for t

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields Buttons Actions Expanded Lookups Related Lists Report Charts Visualforce Pages

Quick Find Button Name *

Address Update	Credit Card	Make Payment	Sharing
Annual Statement	Delete	Manual Payment	Submit for Approval
Clone	Edit	Relationships Viewer	View Self-Service
Copy Address to H...	Enable Self-Service	Request Update	

Contact Sample

Highlights Panel

Customize the highlights panel for this page layout...

Actions in the Publisher ⓘ

Contact Detail

Standard Buttons: Edit Delete Clone Sharing Request Update View Self-Service Enable Self-Service

Custom Buttons: Address Update Make Payment

Contact Information (Header visible on edit only)

Contact Owner: Sample User

Name: Sarah Sample

Account Name: Sample Account

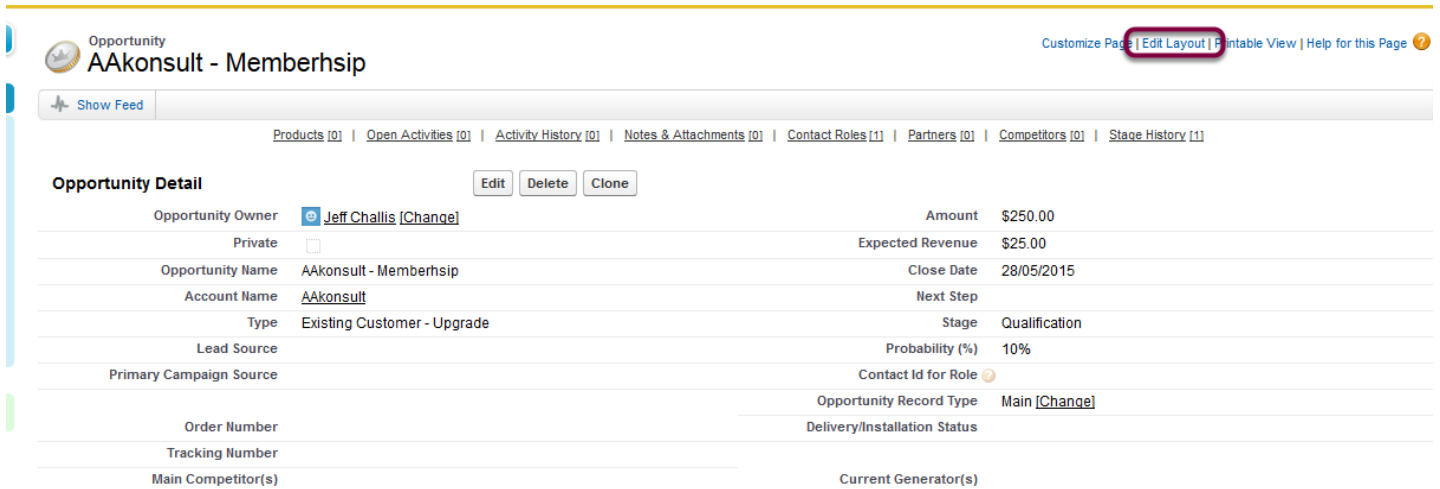
Phone: 1-415-555-1212

Home Phone: 1-415-555-1212

Mobile: 1-415-555-1212

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



Opportunity (Sales) **AAkonsult - Membership** [Customize Page](#) [Edit Layout](#) [Printable View](#) [Help for this Page](#)

[Show Feed](#)

[Products \[0\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Notes & Attachments \[0\]](#) | [Contact Roles \[1\]](#) | [Partners \[0\]](#) | [Competitors \[0\]](#) | [Stage History \[1\]](#)

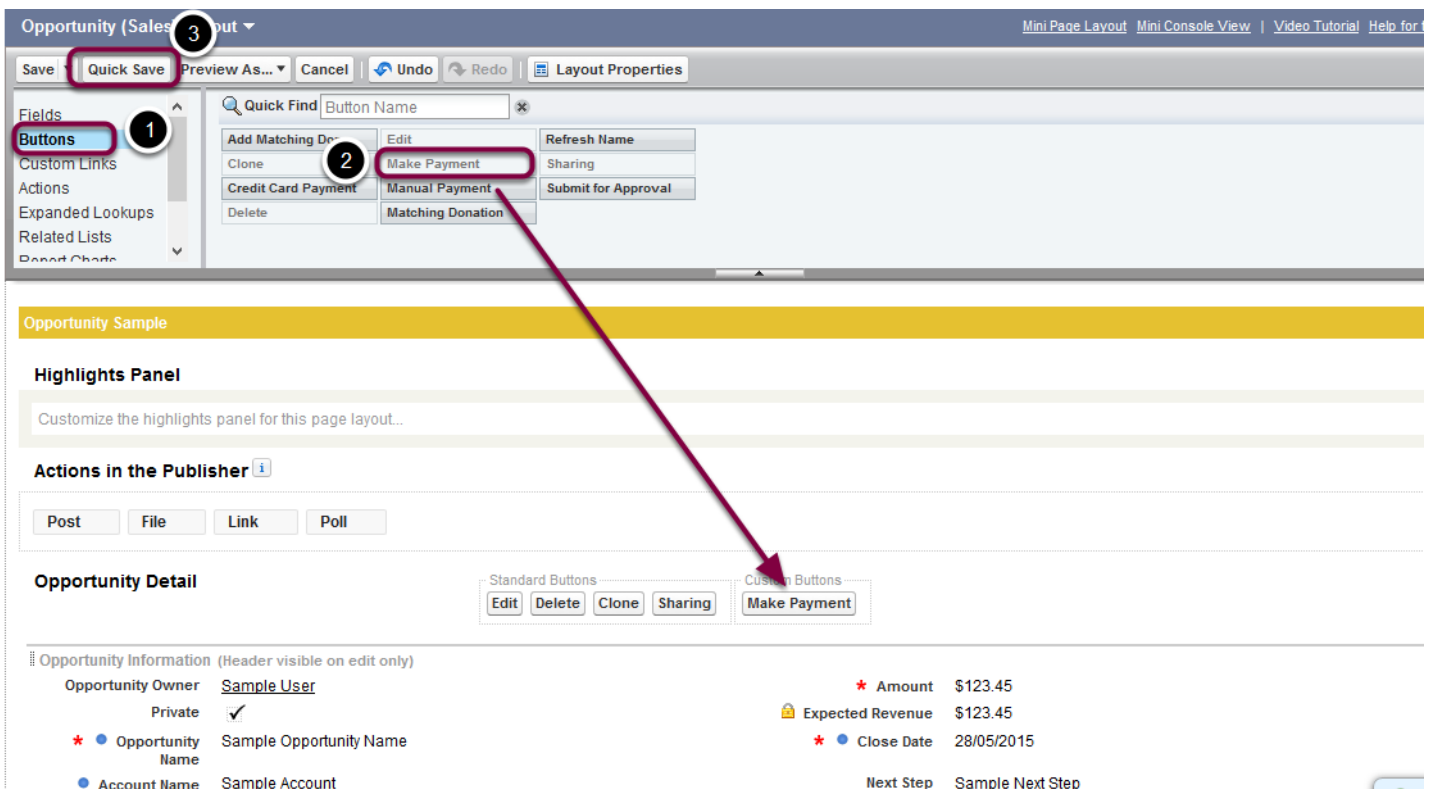
Opportunity Detail [Edit](#) [Delete](#) [Clone](#)

Opportunity Owner	Jeff Challis [Change]	Amount	\$250.00
Private	<input type="checkbox"/>	Expected Revenue	\$25.00
Opportunity Name	AAkonsult - Membership	Close Date	28/05/2015
Account Name	AAkonsult	Next Step	
Type	Existing Customer - Upgrade	Stage	Qualification
Lead Source		Probability (%)	10%
Primary Campaign Source		Contact Id for Role	Main [Change]
Order Number		Opportunity Record Type	Main [Change]
Tracking Number		Delivery/Installation Status	
Main Competitor(s)		Current Generator(s)	

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



Opportunity (Sales) **Opportunity Sample** [Mini Page Layout](#) [Mini Console View](#) [Video Tutorial](#) [Help for this Page](#)

[Save](#) [Quick Save](#) [Preview As...](#) [Cancel](#) [Undo](#) [Redo](#) [Layout Properties](#)

Fields [Buttons](#) [Custom Links](#) [Actions](#) [Expanded Lookups](#) [Related Lists](#) [Report Charts](#)

Buttons [Add Matching Donations](#) [Clone](#) [Credit Card Payment](#) [Delete](#) [Edit](#) [Make Payment](#) [Manual Payment](#) [Matching Donation](#) [Refresh Name](#) [Sharing](#) [Submit for Approval](#)

Opportunity Sample

Highlights Panel

Customize the highlights panel for this page layout...

Actions in the Publisher [Post](#) [File](#) [Link](#) [Poll](#)

Opportunity Detail [Standard Buttons](#) [Custom Buttons](#) [Edit](#) [Delete](#) [Clone](#) [Sharing](#) [Make Payment](#)


Opportunity Information (Header visible on edit only)

Opportunity Owner	Sample User	Amount	\$123.45
Private	<input checked="" type="checkbox"/>	Expected Revenue	\$123.45
Opportunity Name	Sample Opportunity Name	Close Date	28/05/2015
Account Name	Sample Account	Next Step	Sample Next Step

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

Search All Setup...  [Expand All](#) | [Collapse All](#)

Salesforce1 Setup

Force.com Home

System Overview

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings
- My Connected Data












App Setup

- Customize
 - Tab Names and Labels
 - Home
 - Activities
 - Campaigns
 - Leads
 - Accounts
 - Contacts
 - Opportunities
 - Fields
 - Related Lookup Filters
 - Validation Rules
 - Triggers
 - Contact Roles
 - Competitors
 - Page Layouts
 - Field Sets
 - Compact Layouts
 - Search Layouts
- Buttons, Links, and Actions**

Buttons, Links, and Actions

Use this page to manage buttons, links, and actions.

Buttons, Links, and Actions [New Action](#) [New Button or Link](#) [Default Custom Links](#)

Action	Label	Name	Description	Type	Content Source
Edit	 Add Matching Donation <small>DEPRECATED</small>	Add_Matching_Donation		Detail Page Button	OpportunityCr S-Control)
Edit	Add to Campaign	AddInfluence			Standard Sale
Edit	Clone	Clone			Standard Sale
Edit	 Credit Card Payment	Credit_Card_Payment		Detail Page Button	OnClick JavaS
Edit	Delete	Delete			Standard Sale
Edit Del	Delivery Status	DeliveryStatus		Detail Page Link	URL
Edit	Edit	Edit			Standard Sale
Edit	List	List			Standard Sale
Edit	 Make Payment	Make_Payment		Detail Page Button	Visualforce P
Edit	 Make Payment	Make_Payment_action		Custom Visualforce	makePayment (Visualforce)
Edit	 Manual Payment	Manual_Payment		Detail Page Button	OnClick JavaS
Edit	 Matching Donation	Matching_Donation		Detail Page Button	URL
Edit	New	New			Standard Sale
Edit	 New Account Donation	New_Organization_Donation	Replaces the standard New Donation button on the Donations related list on the Organization Page Layout if you have Donation Record Types.	List Button	URL
Edit	 New Contact Donation	New_Contact_Donation	Replaces the standard New Donation button on the Donations related list on the Contact Page Layout if you have Donation Record Types.	List Button	URL
Edit Layout	 New Payment	New_Payment	Creates new Payment child record.	Create a Record	Action Layout
Edit	Opportunities Tab	Tab			Standard Sale
Edit Layout	 Quick Update	Quick_Update		Update a Record	Action Layout
Edit	 Refresh Name	Refresh_Name	Updates this opportunity's name based on the naming scheme in NPSP settings.	Detail Page Button	Visualforce P
Edit	View	View			Standard Sale

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

Opportunity Custom Button or Link
New Button or Link Help for this Page ?

Custom Button or Link Edit Save Quick Save Preview Cancel

1. Label
Name

Description

2. Display Type
☐ Detail Page Link [View example](#)
☒ Detail Page Button [View example](#)
☐ List Button [View example](#)

3. Behavior [View Behavior Options](#)
 Content Source

4. Select Field Type

Insert Field Insert Operator

Functions
 -- All Function Categories --
 ABS
 AND
 BEGINS
 BLANKVALUE
 CASE
 CASESAFEID
 Insert Selected Function

Quick Tips

- [Getting Started](#)
- [Sample Buttons & Links](#)
- [Operators & Functions](#)

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:

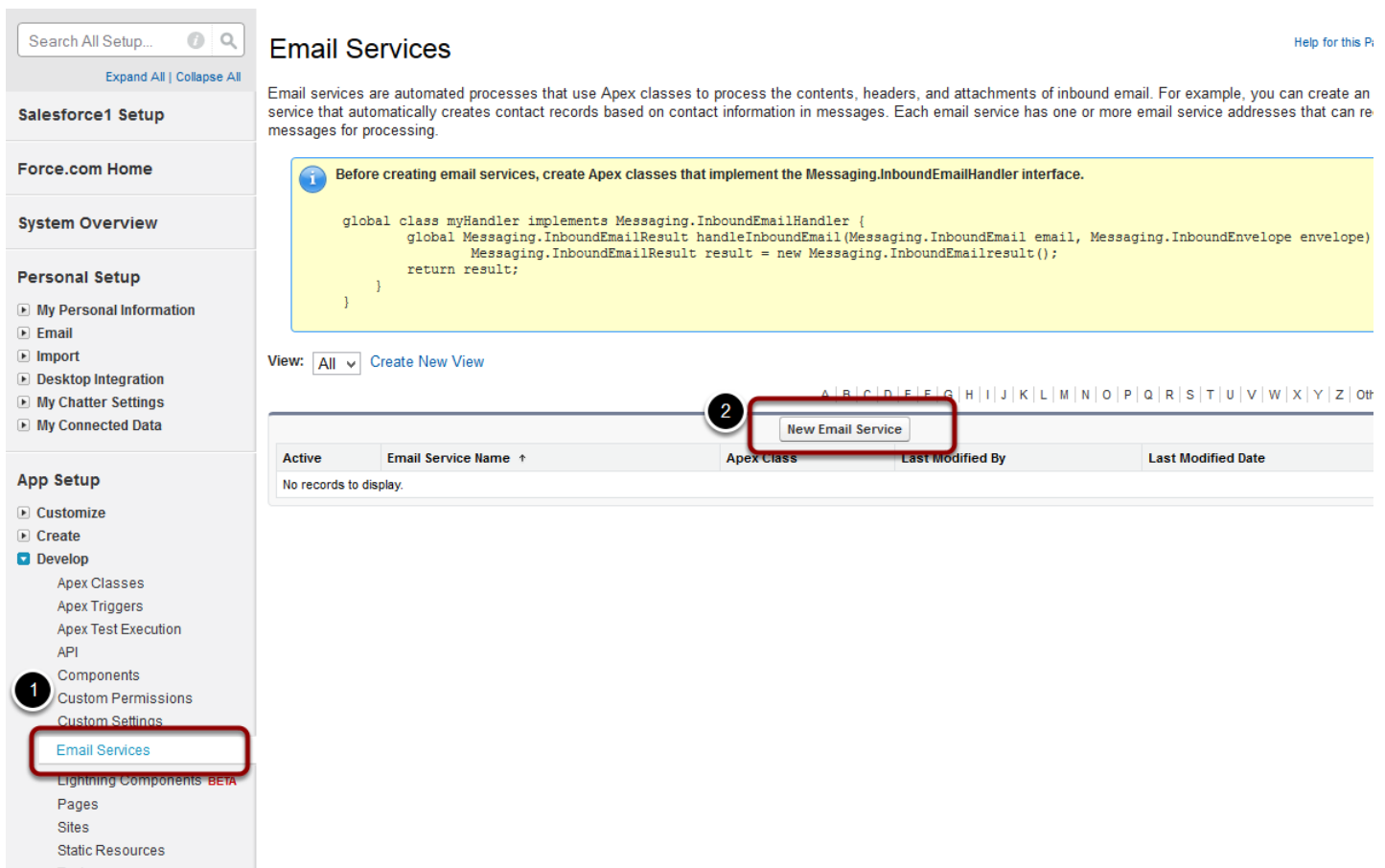
1. Upload from file on your PC/Mac
2. Copy/Paste
3. Email to Salesforce

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



The screenshot shows the Salesforce Setup interface. On the left sidebar, the navigation menu is expanded to 'App Setup' > 'Develop' > 'Email Services', with 'Email Services' highlighted by a red box and a circled '1'. The main content area is titled 'Email Services' and includes a help link. Below the title, there is a code block for an Apex class implementing the `Messaging.InboundEmailHandler` interface. At the bottom of the main content area, there is a 'View:' dropdown set to 'All' and a 'Create New View' link. Below this is a table with columns: 'Active', 'Email Service Name', 'Apex Class', 'Last Modified By', and 'Last Modified Date'. The table currently shows 'No records to display.' A red box and a circled '2' highlight the 'New Email Service' button located above the table.

Email Services

Email services are automated processes that use Apex classes to process the contents, headers, and attachments of inbound email. For example, you can create an service that automatically creates contact records based on contact information in messages. Each email service has one or more email service addresses that can receive messages for processing.

Before creating email services, create Apex classes that implement the `Messaging.InboundEmailHandler` interface.

```
global class myHandler implements Messaging.InboundEmailHandler {
    global Messaging.InboundEmailResult handleInboundEmail(Messaging.InboundEmail email, Messaging.InboundEnvelope envelope) {
        Messaging.InboundEmailResult result = new Messaging.InboundEmailresult();
        return result;
    }
}
```

View: **All** [Create New View](#)

New Email Service

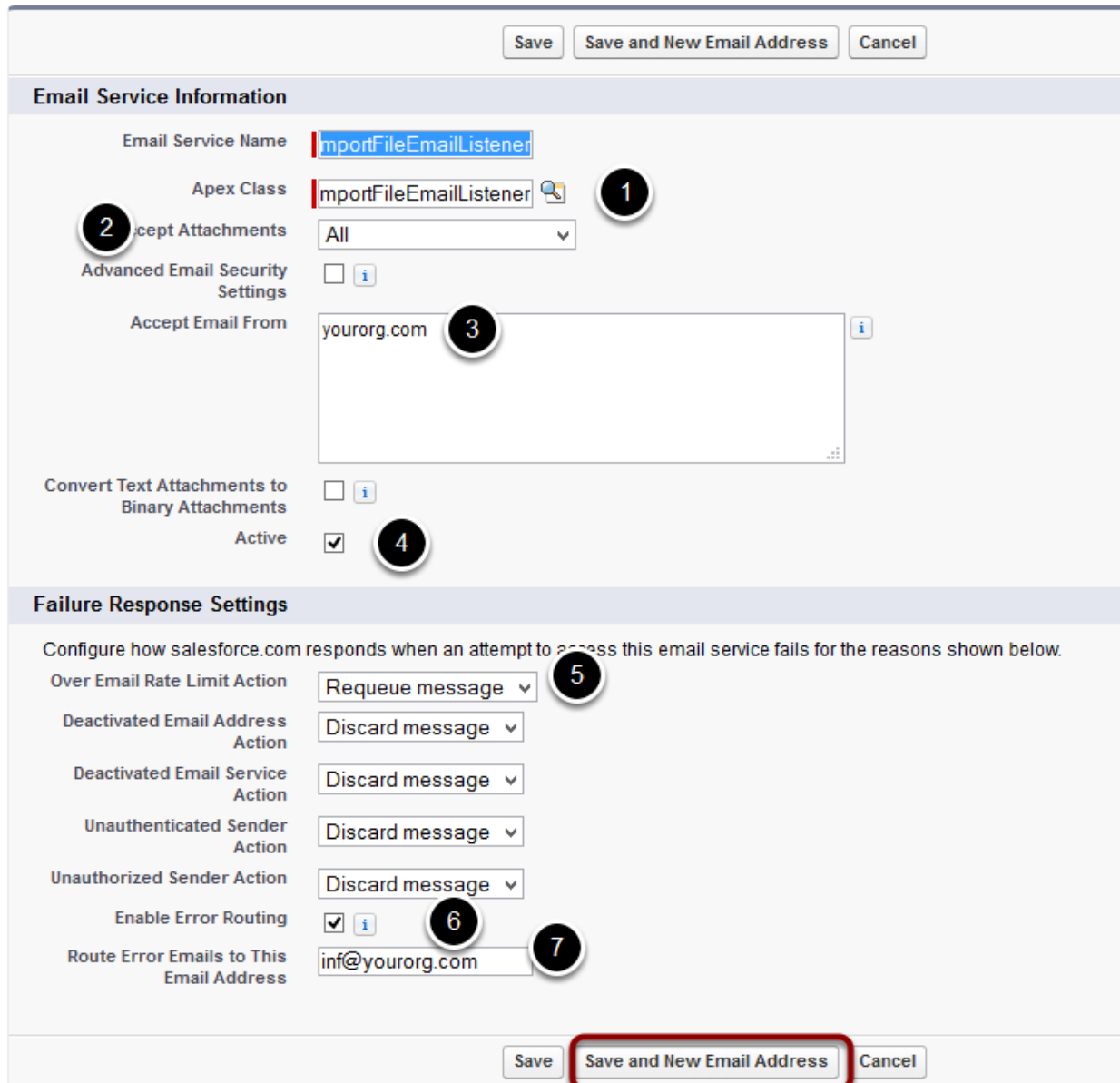
Active	Email Service Name	Apex Class	Last Modified By	Last Modified Date
No records to display.				

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

2. Link Email service to importFileEmailListener

Email Service

Email services let you use Apex classes to process the contents, headers, and attachments of inbound email. Use the settings to create one or more email service addresses to receive messages for processing.



The screenshot shows the 'Email Service' configuration page in Salesforce. It includes sections for 'Email Service Information' and 'Failure Response Settings'. Numbered callouts indicate the following steps:

1. Apex Class: `importFileEmailListener`
2. Accept Attachments: `All`
3. Accept Email From: `yourorg.com`
4. Active: ☒
5. Over Email Rate Limit Action: `Requeue message`
6. Enable Error Routing: ☒
7. Route Error Emails to This Email Address: `inf@yourorg.com`

The 'Save and New Email Address' button is highlighted with a red box.

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.

3. Save the email address

Email Service Address

Email Service Information	
Email Service Name	importFileEmailListener
Accept Email From	yourorg.com

Email Address Information

Email address

importFileEmailListene


Specify the local-part of the email address. Salesforce.com assigns the domain name part of

Active


☒

Context User

jeff challis



Accept Email From



Save

Save and New

Cancel

4. Copy email address for use

Email Service: importFileEmailListener

Help for this Page

Edit

Activate

Deactivate

Delete

Cancel

Email Service Name	importFileEmailListener
Apex Class	importFileEmailListener
Accept Attachments	All
Advanced Email Security Settings	<input type="checkbox"/> i
Accept Email From	yourorg.com
Convert Text Attachments to Binary Attachments	<input type="checkbox"/> i
Active	<input checked="" type="checkbox"/>

▼ Failure Response Settings

Over Email Rate Limit Action	Requeue message
Deactivated Email Address Action	Discard message
Deactivated Email Service Action	Discard message
Unauthenticated Sender Action	Discard message
Unauthorized Sender Action	Discard message
Enable Error Routing	<input checked="" type="checkbox"/> i
Route Error Emails to This Email Address	inf@yourorg.com

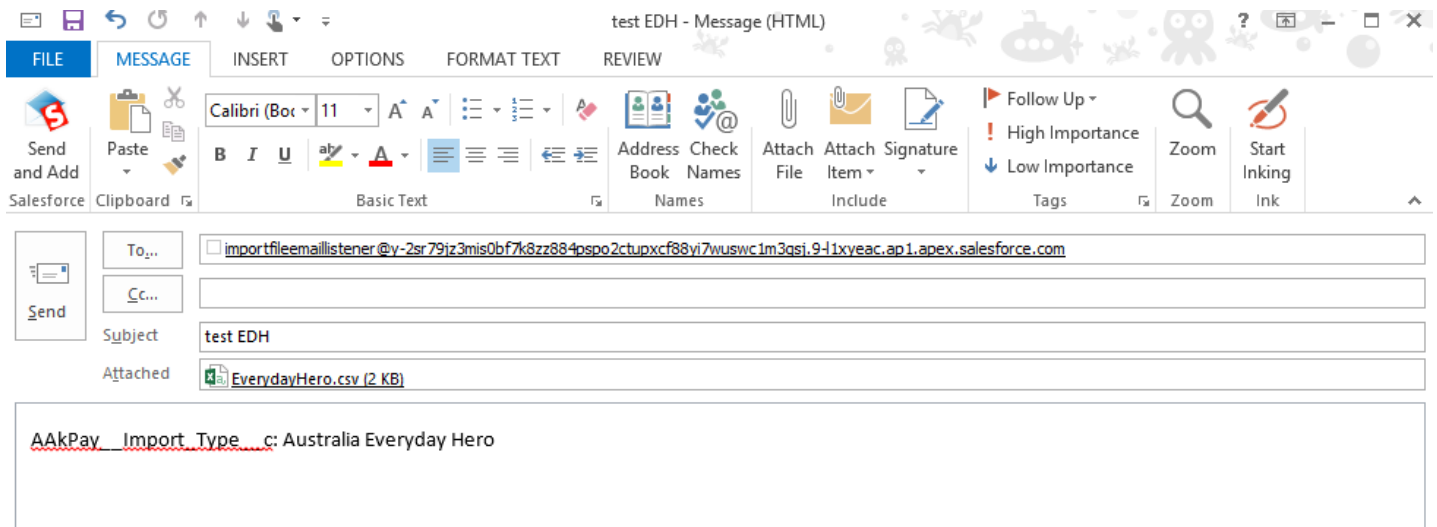
Email Addresses

New Email Address

Action	Email Address	Context User
View Edit	importfileemaillistener@y-2sr79jz3mis0bf7k8zz884pspo2ctupxcf88vi7wuswc1m3qsi.9-11xveac.ap1.apex.salesforce.com	jeff.challis

This is the email address that you can email details into

5. Send a test email



The screenshot shows the Salesforce email composer interface. The top bar includes tabs for FILE, MESSAGE, INSERT, OPTIONS, FORMAT TEXT, and REVIEW. The MESSAGE tab is active, displaying a rich text editor with various formatting options like bold, italic, underline, and color. The email content area shows the following details:

- To:**
- Subject:** test EDH
- Attached:** EverydayHero.csv (2 KB)

The email body contains the text: AAkPay__Import_Type__c: Australia Everyday Hero

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.”

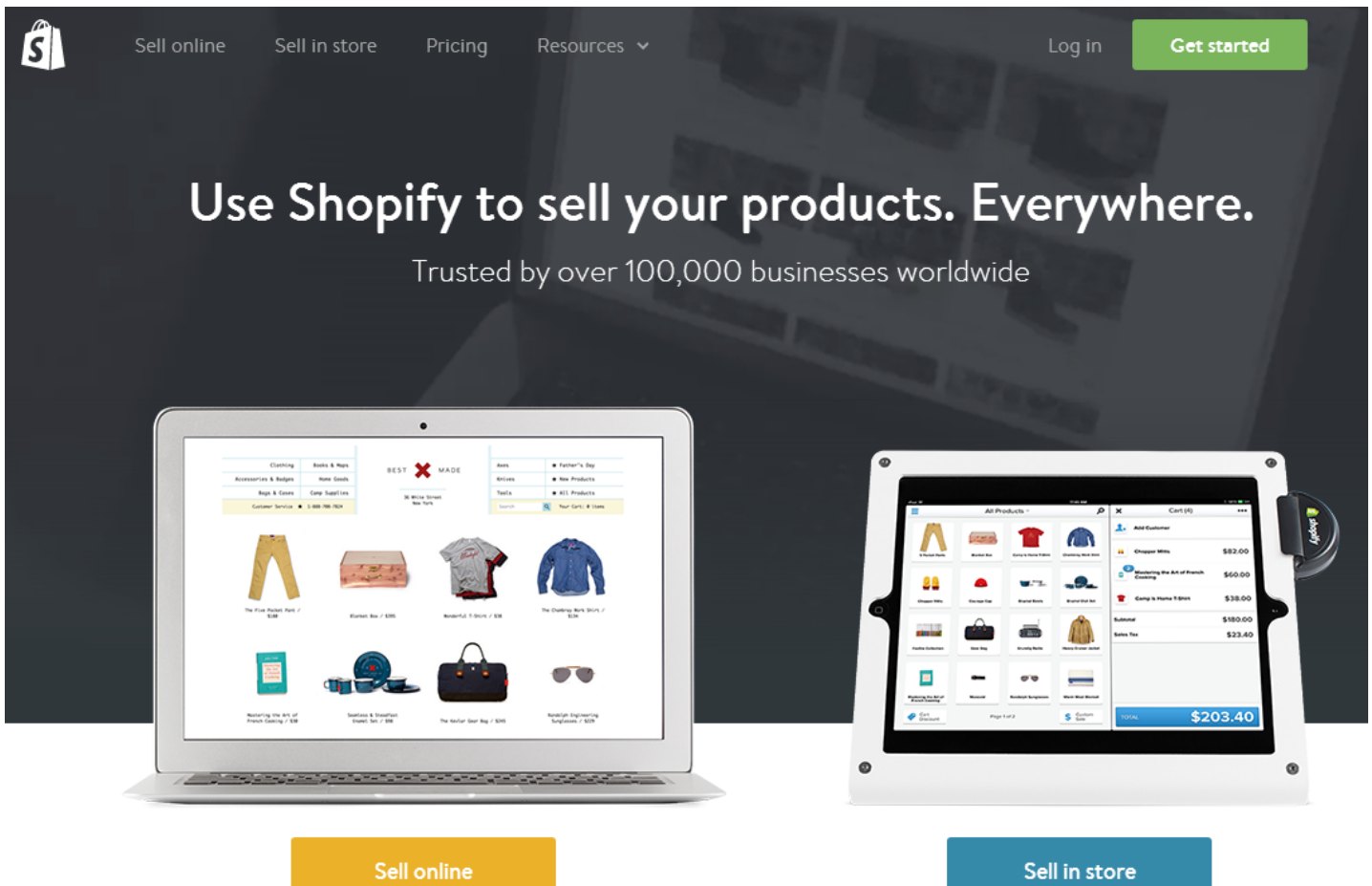
Shopify

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)



Use Shopify to sell your products. Everywhere.

Trusted by over 100,000 businesses worldwide

Sell online

Sell in store

<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@aaconsult.com

2.1 Enter your license details into the Merchant Facilities tab

Note, you can include your logo on the receipt by attaching it to the merchant

Additional License Options

License Options ⓘ Shopify; Direct Debit; Events; Custom Themes

License Expiry Date ⓘ 28/06/2014

License Key ⓘ hHw640ZeuPPHgatS4X6pVHxw3nwCRcpRXcKDapBfKjY=

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	<u>1. Online Payment</u>	<input type="checkbox"/>	Order		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Edit Del	<u>2. Membership</u>	<input type="checkbox"/>	Membership		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Edit Del	<u>3. Subscription</u>	<input type="checkbox"/>	Subscription		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Edit Del	<u>4. Appeal</u>	<input type="checkbox"/>	Donation	<u>DEMO Appeal</u>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Edit Del	<u>5. Donation with option of regular giving</u>	<input type="checkbox"/>	Donation		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Edit Del	<u>6. Event/Training Course</u>	<input type="checkbox"/>	Event		<input type="checkbox"/>	<input checked="" type="checkbox"/>

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

Orders/Supplies/Payments

Enable Delivery Address ⓘ ☐

Freight Amount ⓘ

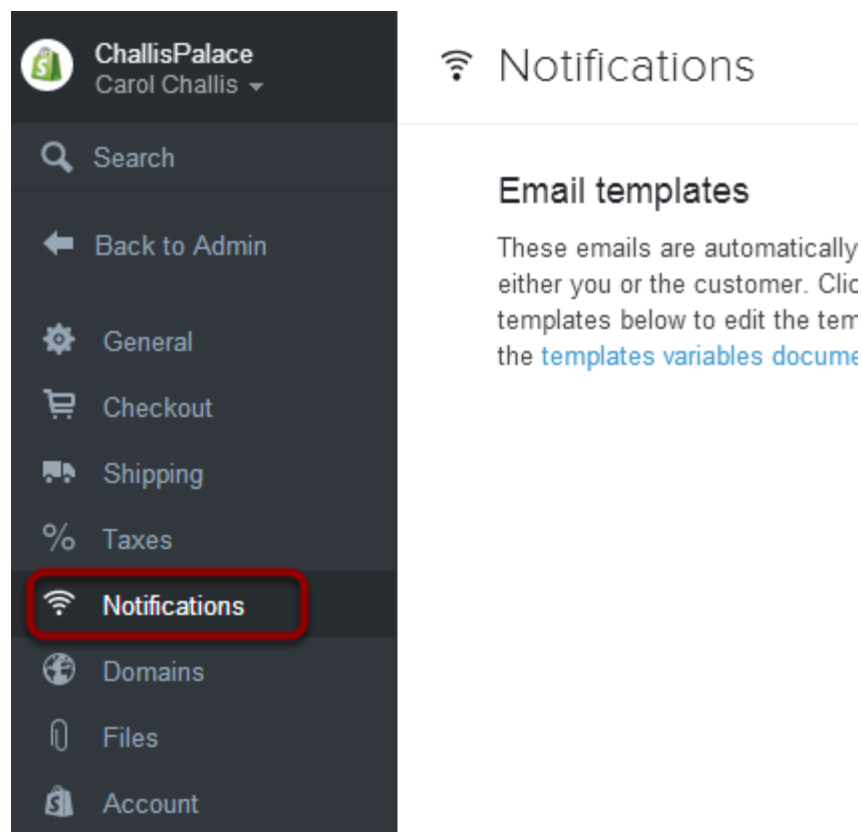
Shopify Webhook ⓘ <https://aakpaytest-developer-edition.ap1.force.com/services/apexrest/AAkPay/shopify/a0C9000000GimuE>

This URL will be required in your Shopify set up.

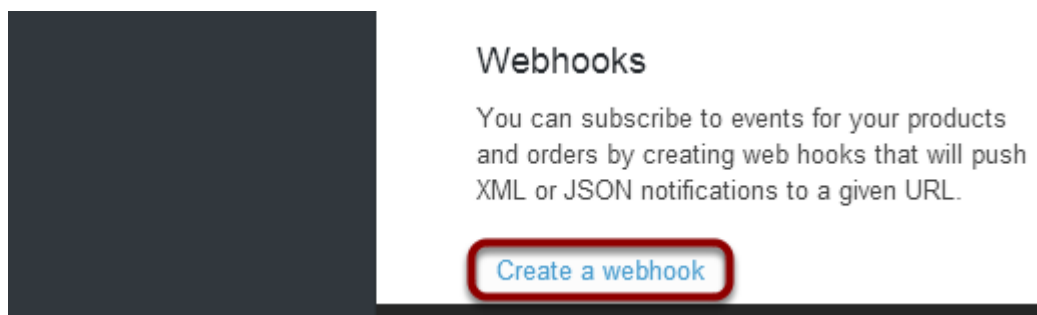
4. Integrate your Shopify account

Login to your Shopify account

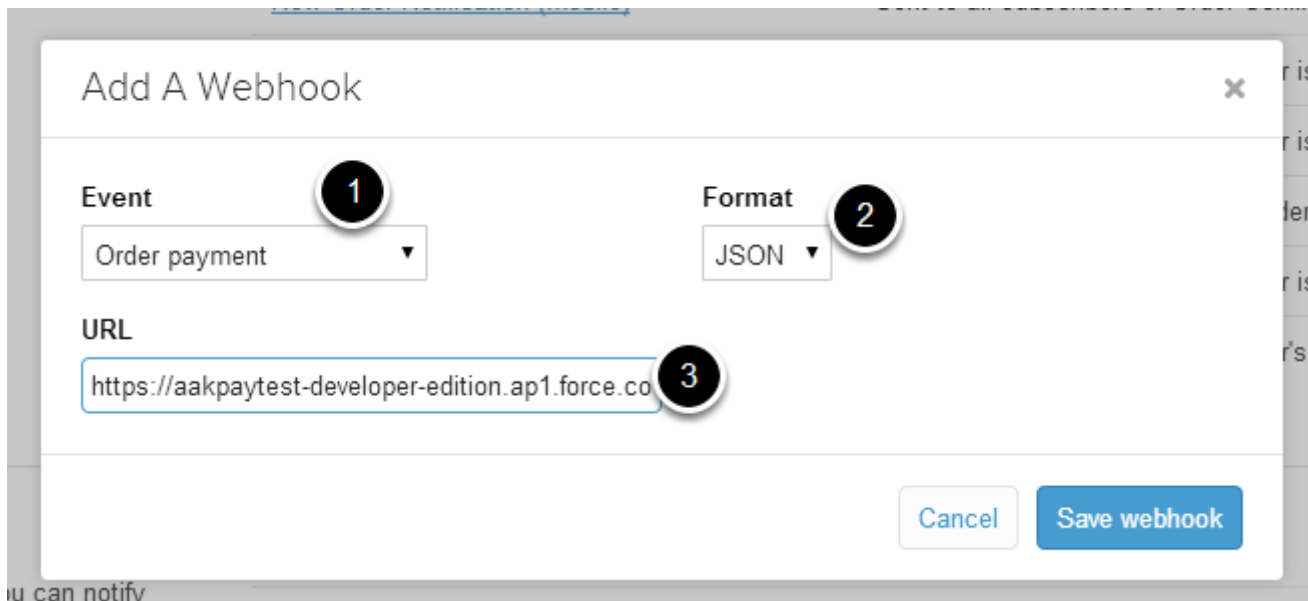
4.1 Navigate to Settings > Notifications



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'

Webhooks			
You can subscribe to events for your products and orders by creating web hooks that will push XML or JSON notifications to a given URL.			
	Event	Callback URL	Format
	Order payment	https://aakpaytest-developer-edition.ap1.force.com/services/apexrest/AAkPay/shopify/a0C9000000GImuE	JSON
			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 include:

- 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

The screenshot illustrates a website interface where a font size selector (1) is part of the main website CMS, and the AAkonsult Payments form (2) is loaded within an iframe.

Font Size Selector (1): A horizontal bar with the text "Choose font size:" followed by seven 'A' icons of increasing size.

AAkonsult Payments DEMO payment page (2):

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 - 3711111111111114
- Diners - 360000000000008

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

First Name*

Last Name*

Phone

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

This must be setup before using the Direct Debits module.

▼ Receipting Our Website  https://aakonsultpayments.com  General Email  info@aakonsultpayments.com  Receipt Label  RECEIPT Document Type  Receipt ABN  Receipt Text  Receipt Footer  Thank you for trialling Aakonsult Payments. Note, you can include your logo on the receipt by attaching it to the Merchant Facility.	Receipt Text Colour  666666 Receipt Body Colour  f1f5f9 Receipt Body Border Colour  8BA9CD Receipt Totals Header Background Colour  9583D7 Receipt Totals Header Text Colour  000000
▼ Additional License Options License Options  Shopify; Direct Debit; Events; Custom Themes; Datatools Kleber	

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