
Set Up Payments

Initial Setup Guide

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INTRODUCTION

The Set Up Payments package aims at providing an easy to use interface for managing payments for AppExchange products. This user guide provides systematic actions to be performed for setting up the Site.

There are essentially two steps to setup and start using the site,

1. **Initial Setup for the Site**
2. **Setting the Site Permissions**

Prerequisites –

1. Your Organization must have the License Management App (LMA) installed.
2. You should have the Salesforce login credentials for accessing the package.

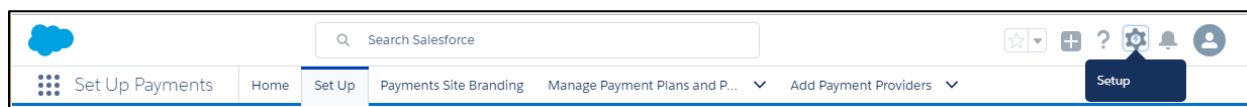
Before diving in, please log in to your Salesforce Sandbox using these credentials.

Site Setup

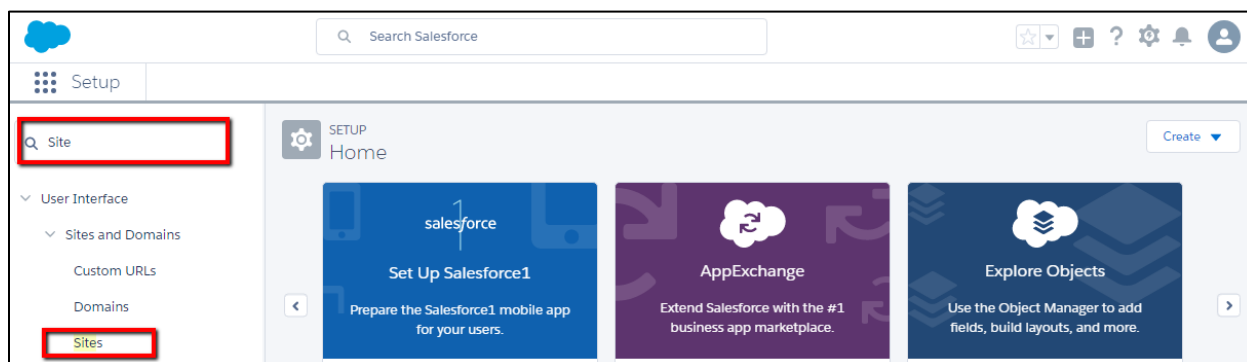
The first step is to set the site name and activate the site.

For the initial setup of the site,

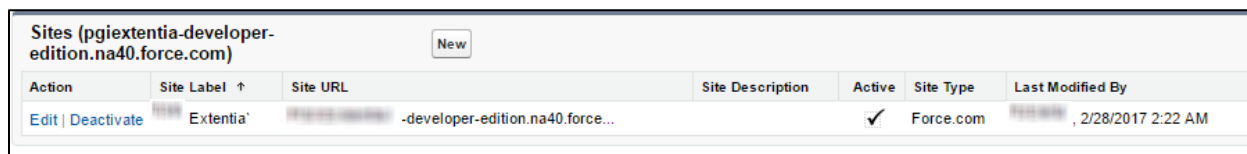
1. Click **Setup**.



2. Search for *Site* in the **Quick Find/Search** box.



3. Click **Sites** from the **User Interface** section.
4. Sites page will be displayed, click **New**.



5. The **Site Edit** page will be displayed.

SETUP Sites

New Site Save Cancel

Site Label: i

Site Name: i

Site Description:

Site Contact: i

Default Web Address: i

Active: ☒ i

Active Site Home Page: i

Inactive Site Home Page: i [Preview]

Site Template: i

6. Enter the **Site Label**. This is the site name, as it would appear on the user interface. **Site Name** will be auto-populated once you enter the **Site Label**.
7. Click the lookup icon and select the name of the contact from your company in **Site Contact**. This would be the user responsible for handling site communications, from either site visitors or the Salesforce team.
8. Ensure to select the **Active** checkbox. The site will be activated, once you finalize and save the site setup.
9. Click the lookup icon and select the **Active Site Home Page** for your interface. For this site, it should be *PGI_VerificationPage*.
10. Verify all the information and click **Save** to confirm.
11. Your Site will be successfully created. The link to your site will be available in the **Site URL**.

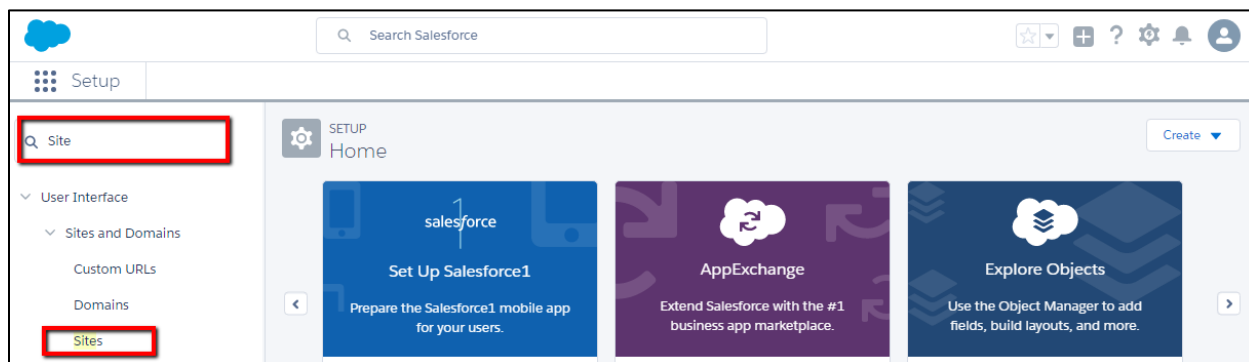
Action	Site Label ↑	Site URL	Site Description	Active	Site Type	Last Modified By
Edit Deactivate	<input type="text" value="Set Up Payments"/>	<input type="text" value="http://iextentia-developer-edition.na40.force.com/"/>		<input checked="" type="checkbox"/>	Force.com	<input type="text" value="2/28/2017 2:22 AM"/>

Note: This is the final Set Up Payment site URL, which you have to share with the App Users.

Setup access for end users

To grant access to the end-user site, please follow the below steps:

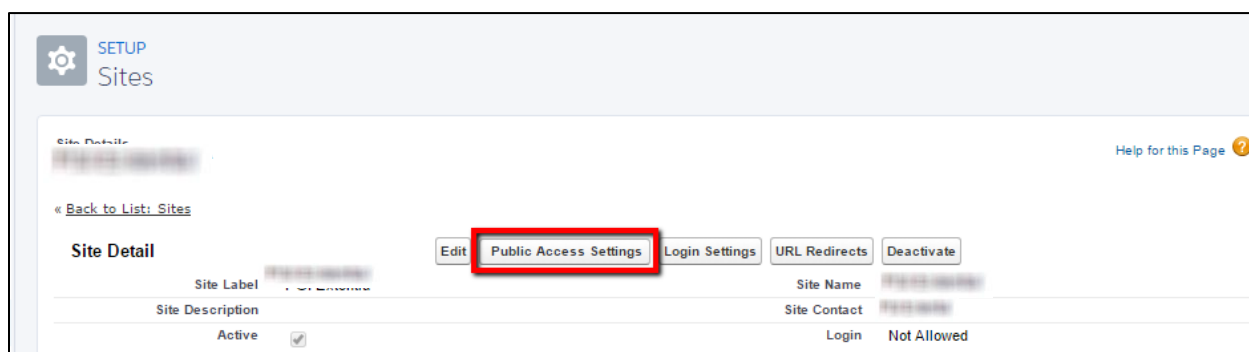
1. Click **Setup**→**Quick Find**→search for '**Sites**'



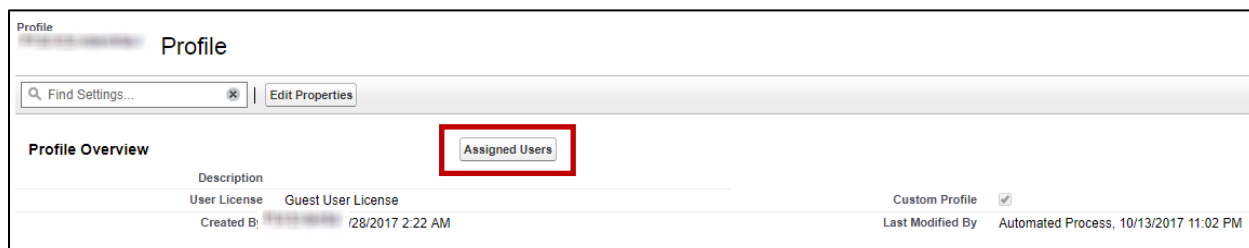
2. Click on **Site Label** record

Action	Site Label	Site URL	Site Description	Active	Site Type	Last Modified By
Edit Deactivate	[Redacted]	a-developer-edition.na40.force.com		<input checked="" type="checkbox"/>	Force.com	[Redacted], 9/14/2017 3:11 AM

3. Click **Public Access Settings**



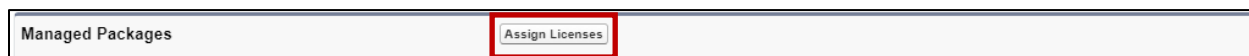
4. Click **Assign users**



5. Click on the **Full Name** record

Action	Full Name	Alias	Username	Last Login	Role	Active	Profile	Manager
Edit	Site Guest User	guest	[Redacted]			<input checked="" type="checkbox"/>	[Redacted] Extentia_Profile	

6. Go to managed packages section and click **Assign Licenses**



7. Select the 'Set up Payments' package and click 'Add'

Assign Licenses Help for this Page

Select the checkbox next to each package you want to assign to this user, and then click Assign. The checkbox is absent if a package does not have sufficient licenses available or the package status is expired or suspended.

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**

Unassigned Packages				
Action	Package Name	Status	Allowed Licenses	Used Licenses
<input checked="" type="checkbox"/>	Set Up Payments	Trial	5	1

Selected Packages				
Action	Package Name	Status	Allowed Licenses	Used Licenses
<input checked="" type="checkbox"/>	Set Up Payments	Trial	5	1

Add **Cancel**

Managed Packages				
Action	Package Name	Status	Allowed Licenses	Used Licenses
Remove	Set Up Payments	Trial	5	1

Assign Licenses

You have successfully granted the site access to the end users.

Site Permissions

After completing the initial setup, certain permissions are required and Visualforce pages need to be set up. You must setup/enable the following components,

1. Standard Objects
2. Custom Objects
3. Visualforce Pages
4. Apex Classes
5. Custom Fields

Standard Object Permission

The standard objects – Accounts, Leads, and Contacts require Read Access.

To provide the requisite access to the standard Salesforce objects,

1. Open the **Site Label**.

Action	Site Label	Site URL	Site Description	Active	Site Type	Last Modified By
Edit Deactivate	Extentia	extentia-developer-edition.na40.force...		<input checked="" type="checkbox"/>	Force.com	2/28/2017 2:22 AM

2. The **Site Details** page will be displayed. Click **Public Access Settings**.

SETUP
Sites

Site Details
PGI Extentia

« Back to List: Sites

Site Detail

Buttons: Edit, **Public Access Settings**, Login Settings, URL Redirects, Deactivate

Site Label: Extentia

Site Name: PGI Extentia

Site Description: PGI Extentia

Site Contact: PGI Extentia

Active: ☒

Login: Not Allowed

Active Site Home Page: PGI Extentia

Inactive Site Home Page: PGI Extentia

Site Template: PGI Extentia

Site Favorite Icon: PGI Extentia

Site Robots.txt: PGI Extentia

Enable Feeds: ☐

Analytics Tracking Code: PGI Extentia

URL Rewriter Class: PGI Extentia

Clickjack Protection Level: Allow framing by the same origin only (recommended)

Require Secure Connections (HTTPS): ☒

Guest Access to the Support API: ☐

Created By: PGI Extentia 2/28/2017 2:22 AM

Last Modified By: PGI Extentia 2/28/2017 2:22 AM

Buttons: Edit, Public Access Settings, Login Settings, URL Redirects, Deactivate

3. The **Profile** page will be displayed. Click **Object Settings**.

SETUP
Profiles

Apps

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings that specify which record types, page layouts, and tabs are visible

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

Settings that apply to Salesforce apps, such as Sales, and custom apps built on Force.com
[Learn More](#)

4. Click **Accounts** from the **Object Name** column.

SETUP
Profiles

Profile
PGI Extentia Profile

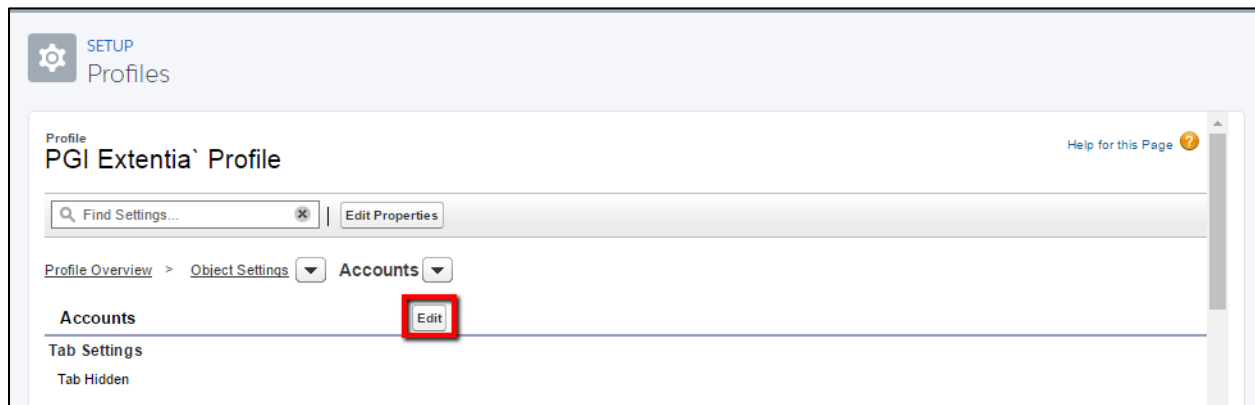
Find Settings... | Edit Properties

Profile Overview > **Object Settings**

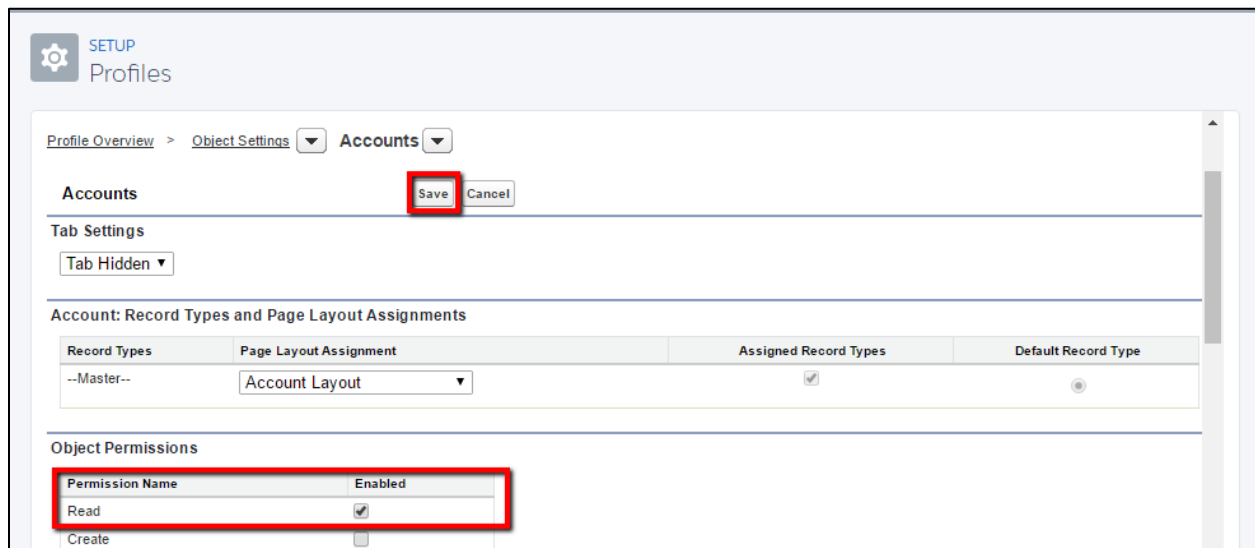
All Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings	Page Layouts
Accounts	Read	37	Tab Hidden	Account Layout
Add Payment Providers	Read, View All	26	Tab Hidden	Varies by Record Type
App Launcher	--	--	Default On	--

5. Click **Edit**.



6. Enable the *Read* access and click **Save**.



7. Repeat the above steps (#4, #5, and #6) for **Contacts** and **Leads** from the **Object Name** column.

Custom Object Permission

Custom objects also require certain permissions.

To provide the requisite access to custom Salesforce objects,

1. Navigate to the **Profile** page – refer to the steps in **Standard Object Permission** to access the **Profile** page.
2. Search for **PGI Brandings** and click to open the object.
3. Click **Edit** and set the *Read* and *View All* access for this object.

PGI Brandings			
<div>Tab Settings</div> <div>Tab Hidden</div>			
Record Types and Page Layout Assignments			
Record Types	Page Layout Assignment	Assigned Record Types	Default Record Type
--Master--	Branding Layout	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Object Permissions			
Permission Name	Enabled		
Read	<input checked="" type="checkbox"/>		
Create	<input type="checkbox"/>		
Edit	<input type="checkbox"/>		
Delete	<input type="checkbox"/>		
View All	<input checked="" type="checkbox"/>		
Modify All	<input type="checkbox"/>		

4. Click **Save**.

Similarly, set the following access for the Custom Objects.

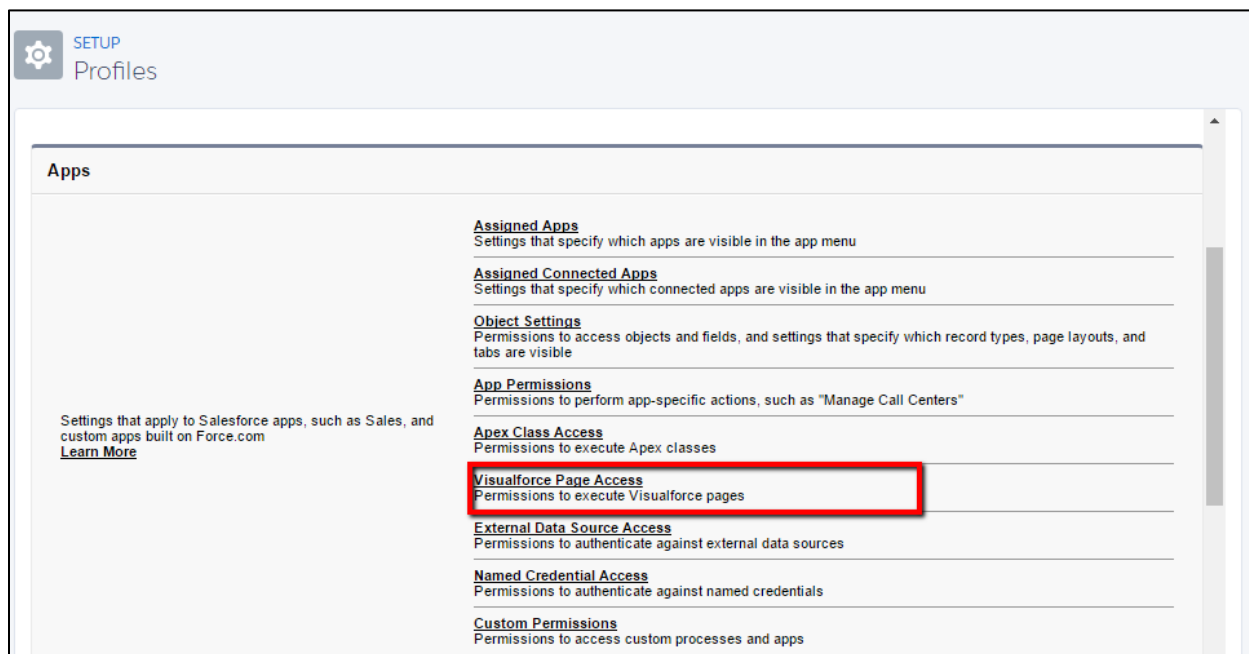
Sr. No	Custom Object Name	Permission(s)
1.	License Requests	Read, Edit, Create and View All
2.	Licenses	Read, Edit and View All
3.	Packages	Read and View All
4.	Package Versions	Read and View All
5.	Payment Plans and Pricing	Read and View All
6.	Payment Providers	Read and View All
7.	Transaction Details	Read, Create, Edit and View All
8.	Verification OTP	Read, Edit, Create, View All

Visualforce Pages

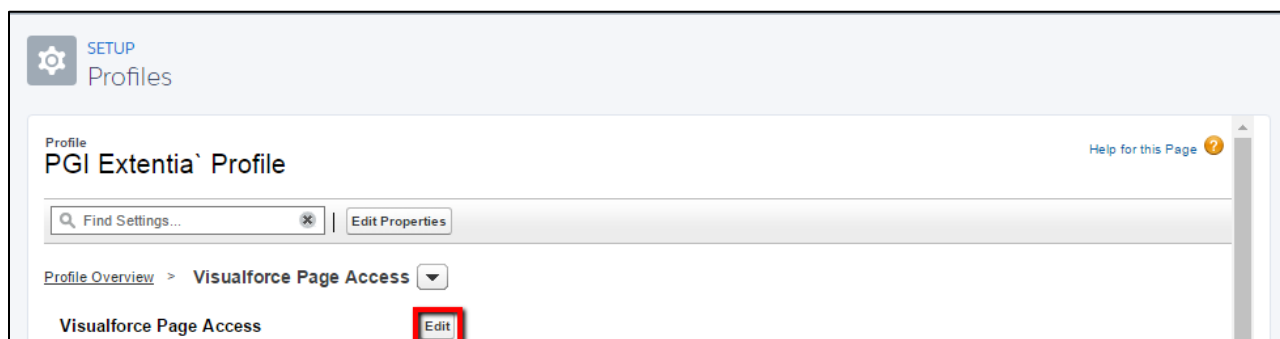
The next step is to enable the Visualforce pages.

To enable the Visualforce pages for the site,

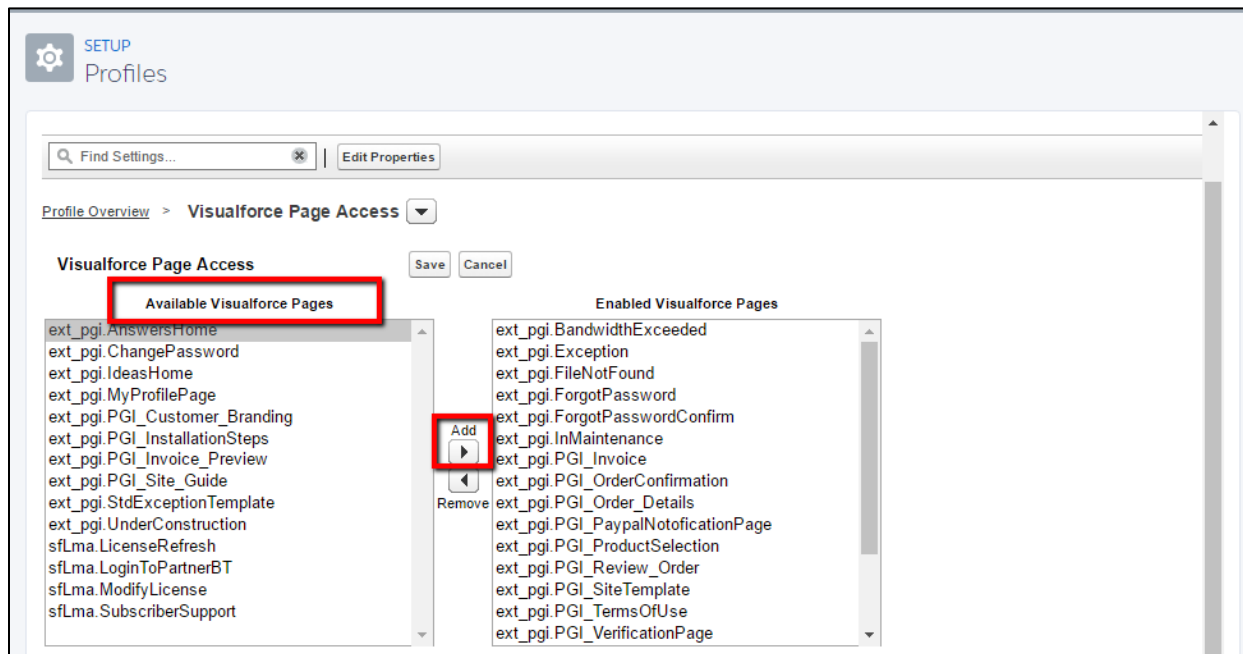
1. Navigate to the **Profile** page – refer to the steps in **Standard Object Permission** to access the Profile page.
2. Click **Visualforce Page Access**.



3. Click **Edit**.



4. In **Available Visualforce Pages**, select the Visualforce pages (listed below) and click **Add**.



Here are the Visualforce pages,

- | | |
|---------------------------------------|---------------------------------|
| 1. ext_pgi.PGI_VerificationPage | 6. ext_pgi.PGI_ProductSelection |
| 2. ext_pgi.PGI_Invoice | 7. ext_pgi.PGI_Review_Order |
| 3. ext_pgi.PGI_OrderConfirmation | 8. ext_pgi.PGI_SiteTemplate |
| 4. ext_pgi.PGI_Order_Details | 9. ext_pgi.PGI_TermsOfUse |
| 5. ext_pgi.PGI_PaypalNotoficationPage | |

5. Ensure that all the selected pages are added in **Enabled Visualforce Pages** and then click **Save**.

Apex Classes

To enable the Apex classes,

1. Navigate to the **Profile** page – refer to the steps in [Standard Object Permission](#) to access the **Profile** page.
2. **Profile** page will be displayed. Click **Apex Class Access**.

Apps

Settings that apply to Salesforce apps, such as Sales, and custom apps built on Force.com
[Learn More](#)

Assigned Apps
 Settings that specify which apps are visible in the app menu

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 Permissions to access objects and fields, and settings that specify which record types, page layouts, and tabs are visible

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Apex Class Access
 Permissions to execute Apex classes

Visualforce Page Access
 Permissions to execute Visualforce pages

External Data Source Access
 Permissions to authenticate against external data sources

Named Credential Access
 Permissions to authenticate against named credentials

Custom Permissions
 Permissions to access custom processes and apps

3. Click **Edit**.

Profile
PGI Extentia` Profile [Help for this Page](#)

Find Settings... | Edit Properties

Profile Overview > Apex Class Access

Apex Class Access **Edit**

4. In **Available Apex Classes**, select the Apex classes (listed below) and click **Add**.

Profile
PGI Extentia` Profile

Find Settings... | Edit Properties

Profile Overview > Apex Class Access

Apex Class Access **Save** **Cancel**

Available Apex Classes		Enabled Apex Classes
ext_pgi.ChangePasswordController	Add ▶	ext_pgi.PGI_Customer_Branding_Controller
ext_pgi.ChangePasswordControllerTest		ext_pgi.PGI_GenerateInvoiceCtrl
ext_pgi.ForgotPasswordController	Remove ◀	ext_pgi.PGI_InstallationSteps_Controller
ext_pgi.ForgotPasswordControllerTest		ext_pgi.PGI_OrderConfirmation_Controller
ext_pgi.MyProfilePageController		ext_pgi.PGI_OrderDetails_Controller
ext_pgi.MyProfilePageControllerTest		ext_pgi.PGI_OrderReviewCtrl
ext_pgi.PGI_Customer_Branding_Controller_Test		ext_pgi.PGI_PaymentResponseHandler
ext_pgi.PGI_GenerateInvoiceCtrl_Test		ext_pgi.PGI_Payment_Setup_Ctrl
ext_pgi.PGI_InstallHandler		ext_pgi.PGI_PaypalForm_Controller
ext_pgi.PGI_InstallHandlerTest		ext_pgi.PGI_ProductSelectionCtrl
ext_pgi.PGI_InstallationSteps_Controller_Test		ext_pgi.PGI_SiteTemplateController
ext_pgi.PGI_OrderConfirmation_Controller_Test		ext_pgi.PGI_TermsOfUseController
ext_pgi.PGI_OrderDetails_Controller_Test		ext_pgi.PGI_ThemeWrapper
ext_pgi.PGI_OrderReviewCtrl_Test		ext_pgi.PGI_Trigger_Helper
ext_pgi.PGI_ProductSelectionCtrl_Test		ext_pgi.PGI_Util

Following are the Apex classes,

- | | |
|---|--|
| 1. ext_pgi.PGI_GenerateInvoiceCtrl | 11. ext_pgi.PGI_Stripe_Webhook_Handler |
| 2. ext_pgi.PGI_OrderConfirmation_Controller | 12. ext_pgi.PGI_TermsOfUseController |
| 3. ext_pgi.PGI_OrderDetails_Controller | 13. ext_pgi.PGI_ThemeWrapper |
| 4. ext_pgi.PGI_OrderReviewCtrl | 14. ext_pgi.PGI_Util |
| 5. ext_pgi.PGI_PaymentResponseHandler | 15. ext_pgi.PGI_VerificationPageController |
| 6. ext_pgi.PGI_Payment_Setup_Ctrl | 16. ext_pgi.PGI_paymentMessageWrapper |
| 7. ext_pgi.PGI_PaypalForm_Controller | 17. ext_pgi.QueryHandler |
| 8. ext_pgi.PGI_ProductSelectionCtrl | |
| 9. ext_pgi.PGI_SiteTemplateController | |
| 10. ext_pgi.PGI_Stripe_Integration | |

5. Ensure all the Apex classes are added in **Enabled Apex Classes** and click **Save**.

Custom Fields

The last step in setting up the Set Up Payments site is providing access to the custom fields.

To access and setup the custom field accesses,

1. Navigate to **Object Settings** in **Profile** page – refer to the steps in [Custom Object Permission](#) to access the **Object Settings**.
2. Search for **License Requests** object and click to open.
3. Click **Edit**.
4. Scroll to **Field Permissions** section and enable **Edit Access** for these fields – Account, Contact, Invoice Amount, No. Of Seats, Package, Payment Gateway, Payment Gateway Name, Payment Status, Recurring, Related License ID, Subscription Id, Subscription Model, and Term in Months.

Similarly, enable **Read Access** for all the fields *except* **Amount after Discount** and **Discount Code**.

Field Permissions		
Field Name	Read Access	Edit Access
Account	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Amount after Discount	<input type="checkbox"/>	<input type="checkbox"/>
Contact	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Discount Code	<input type="checkbox"/>	<input type="checkbox"/>
Invoice Amount	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Last Modified By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
License	<input checked="" type="checkbox"/>	<input type="checkbox"/>
License Request Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
No of Seats	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Package	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Payment Gateway	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Payment Gateway Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Payment Status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PayPal Subscription Id	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Recurring	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Related License ID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Subscription Id	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Subscription Model	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Term in Months	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Transaction Initiated	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- Click **Save**.
- Similarly, access the objects Transactions Details, Verification OTP, Licenses, PGI Brandings, Manage Payment Plans and Pricing, and Add Payment Providers and set the accesses as listed below.

Sr. No	Object Name	Enable Edit Access	Enable Read Access
1.	Transaction Details	Amount, IPN Id, Is Payment Tampered, License, License Request, Payment Gateway, Payment Gateway Name, Payment Status, Status, Subscription Id, Transaction Details and Transaction Type	All fields
2.	Verification OTP	Contact, Customer, Lead, OTP Code, Owner, and Used	All fields
3.	Licenses	Account, Contact, Expiration, Lead, License Type, Org Type, Owner, Record Type, Seats, Status, Used Licenses	All the fields <i>except</i> – Help, Information Current As Of, Package Name, Package Version Number,

			Proxy User, Version Number
4.	PGI Brandings	None	All fields
5.	Manage Payment Plans and Pricing	None	All fields
6.	Add Payment Providers	None	All fields

This completes the initial setup of the **Set Up Payments** site.

To complete the site setup before sharing the site URL with the App Users, please refer to the [Set Up Payments App Builder User Guide](#).

Tier-based pricing setup

To add a new payment plan and pricing, navigate to the page **Payment Plans and Pricing**.

The screenshot shows the 'Payment Plans and Pricing' page. At the top, there's a navigation bar with 'Home', 'Set Up', 'Payments Site Branding', 'Payment Plans and Pricing' (selected), and 'Payment Providers'. Below the navigation bar, there's a section for 'All Plan' with a dropdown menu and links for 'Edit', 'Delete', and 'Create New View'. A 'New Payment Plan and Pricing' button is visible. Below this, there's a table with columns: Action, Pricing Name, Package, Terms, and Active. The table lists four existing plans: P-0196 (Email Composer), P-0200 (Field Trip), P-0204 (Event Manager), and P-0208 (Assembly Pit), all with monthly terms and active status.

1. Click **New Payment Plan and Pricing**
2. Select the record type from the drop-down options: Price Per User, Price Per Org and click **Continue**

The screenshot shows the 'Select Payment Plan and Pricing Record Type' dialog box. It has a section for 'Record Type of new record' with a dropdown menu showing 'Price Per User', 'Price Per Org', and 'Price Per User'. The 'Continue' button is highlighted with a red box. Below this, there's a section for 'Available Payment Plan and Pricing Record Types' with a table:

Record Type Name	Description
Price Per Org	Org Based Pricing
Price Per User	User Based Pricing

3. Based on the selected record type, the system will capture the pricing details on the next page.

Case 1: Price Per Org

- Choose the **package** using the lookup for which you want to configure the payment plan

- Fill the term, amount and whether you want to activate the payment plan and click **Save**

Note: At a time, only one payment plan for the selected package and type of term (monthly, quarterly, half-yearly and yearly) can be activated in the system. In case, the pricing model is duplicated, the system will generate an error.

Case 2: Price Per User

- Choose the **package** using the lookup for which you want to configure the payment plan
- Fill the term, amount, Min and Max number of users for the tier and check the box if you want to activate the plan and click **Save**

Note: At a time, only one payment plan for the selected package and tier (monthly, quarterly, half-yearly and yearly) can be activated in the system. In case, the pricing model is duplicated, Salesforce will display an error message.