EXTENTIA
INFORMATION TECHNOLOGY

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.

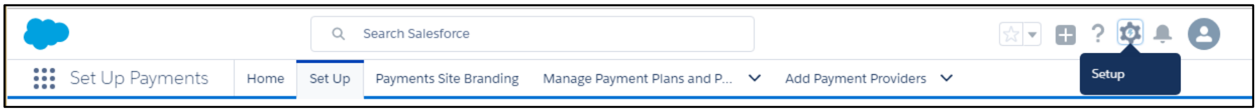
Before diving in, please log in to your Salesforce Sandbox using these credentials.

Site Setup

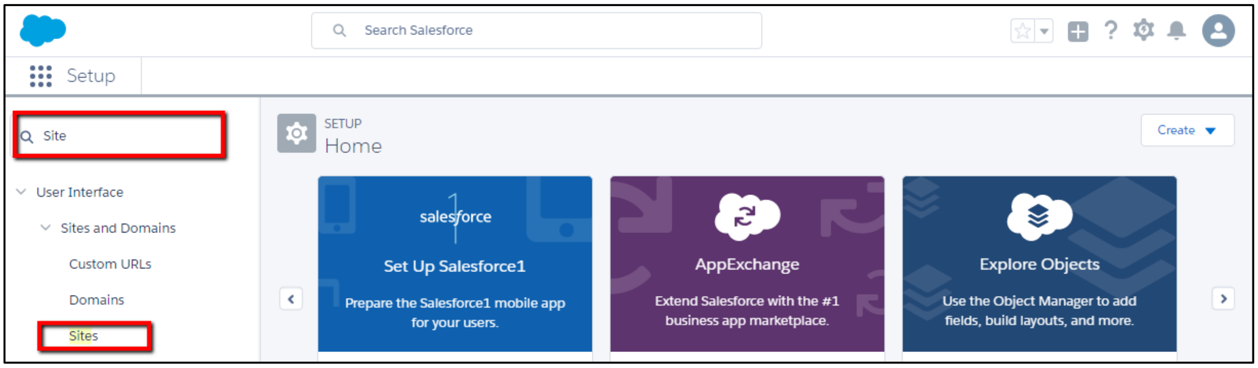
The first step is to set the site name and activate the site.

For the initial setup of the site,

1. Click **Setup.**

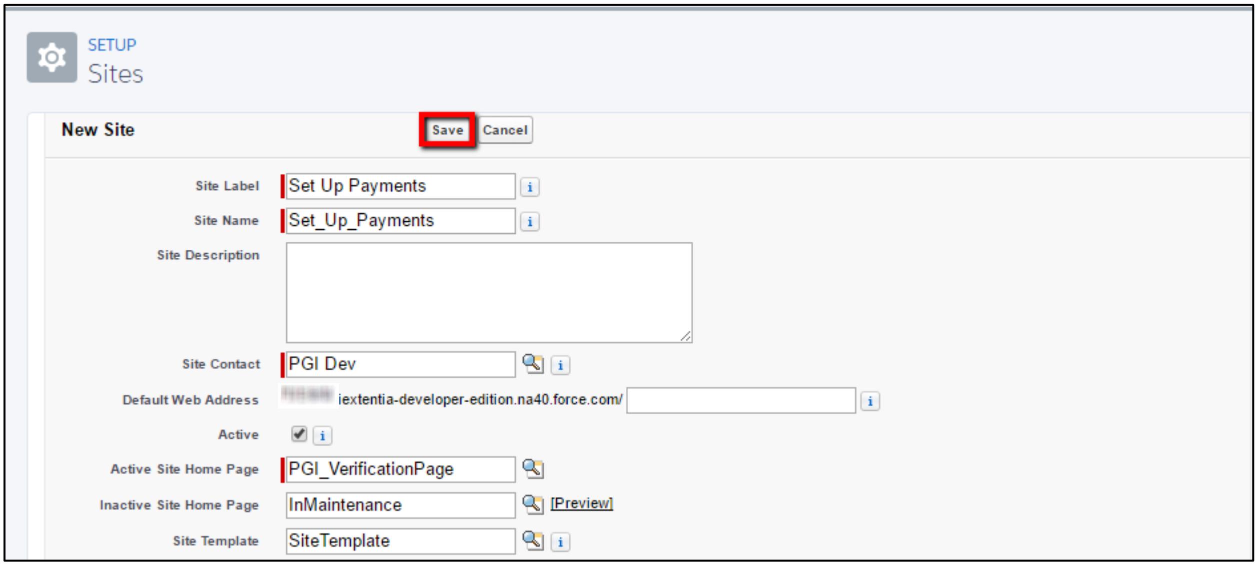


2. Search for *Site* in the **Quick Find/Search** box.

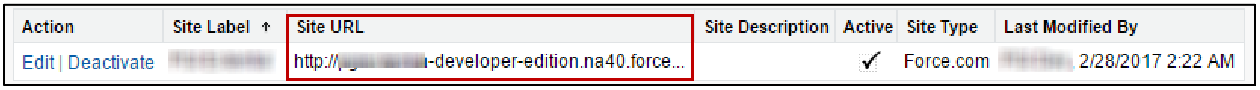


3. Click **Sites** from the **User Interface** section.
4. Sites page will be displayed, click **New.**

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



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**.

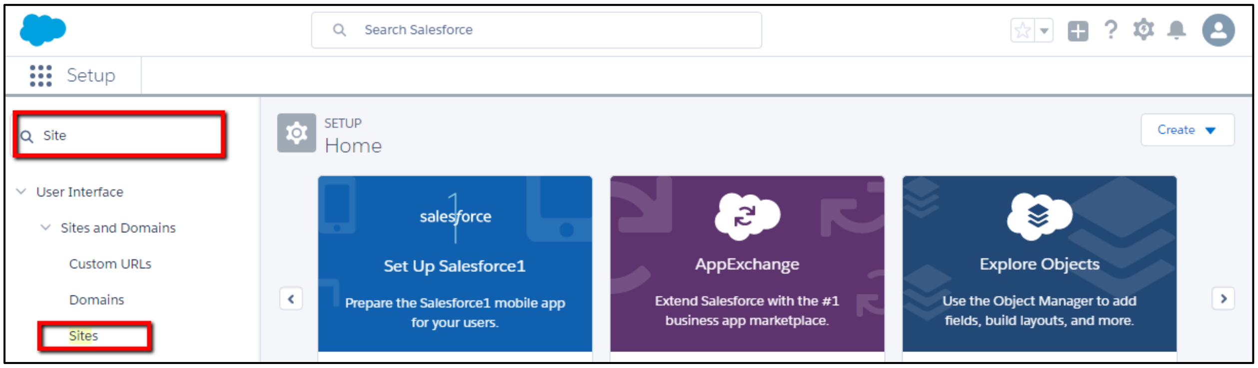


Note: This is the final Set Up Payment site URL, which you have to share with the App Users.

Setup access for end users

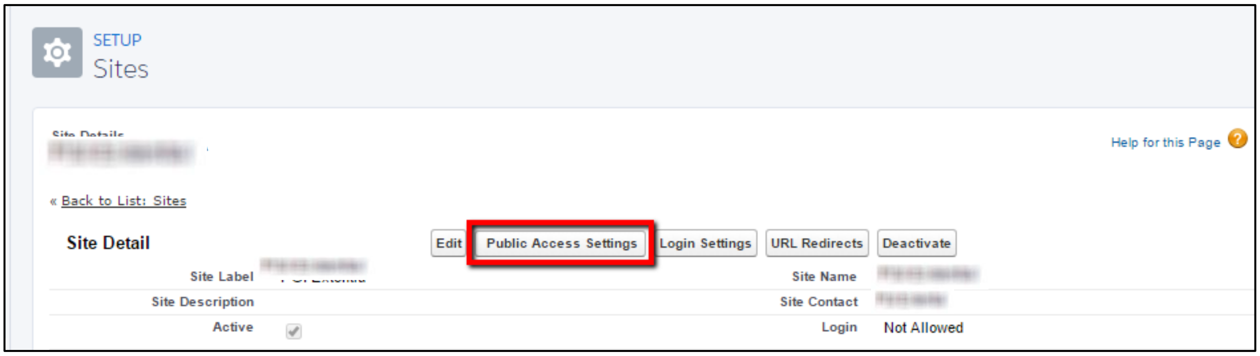
To grant access to the end-user site, please follow the below steps:

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



2. Click on **Site Label** record

3. Click **Public Access Settings**

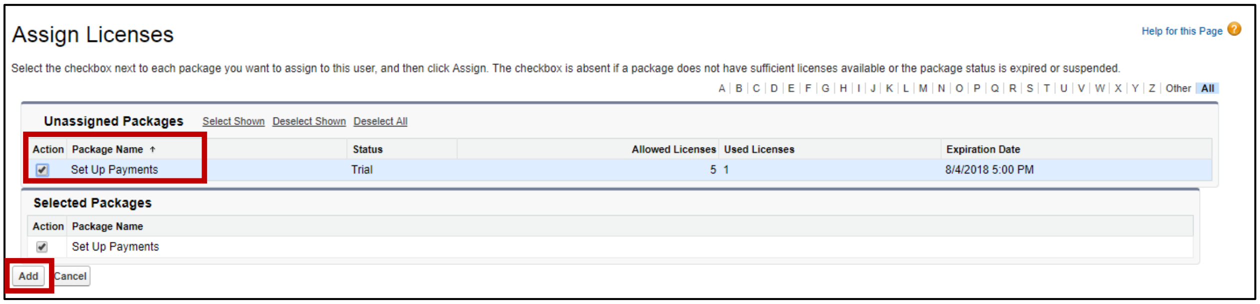


4. Click **Assign users**

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

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

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



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,

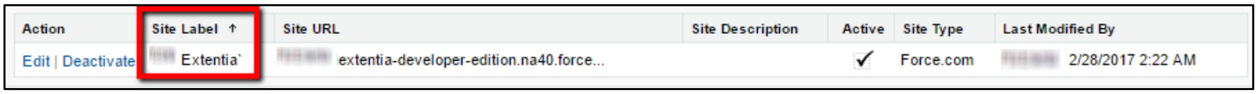
1. Standard Objects
2. Custom Objects
3. Visualforce Pages
4. Apex Classes
5. Custom Fields

Standard Object Permission

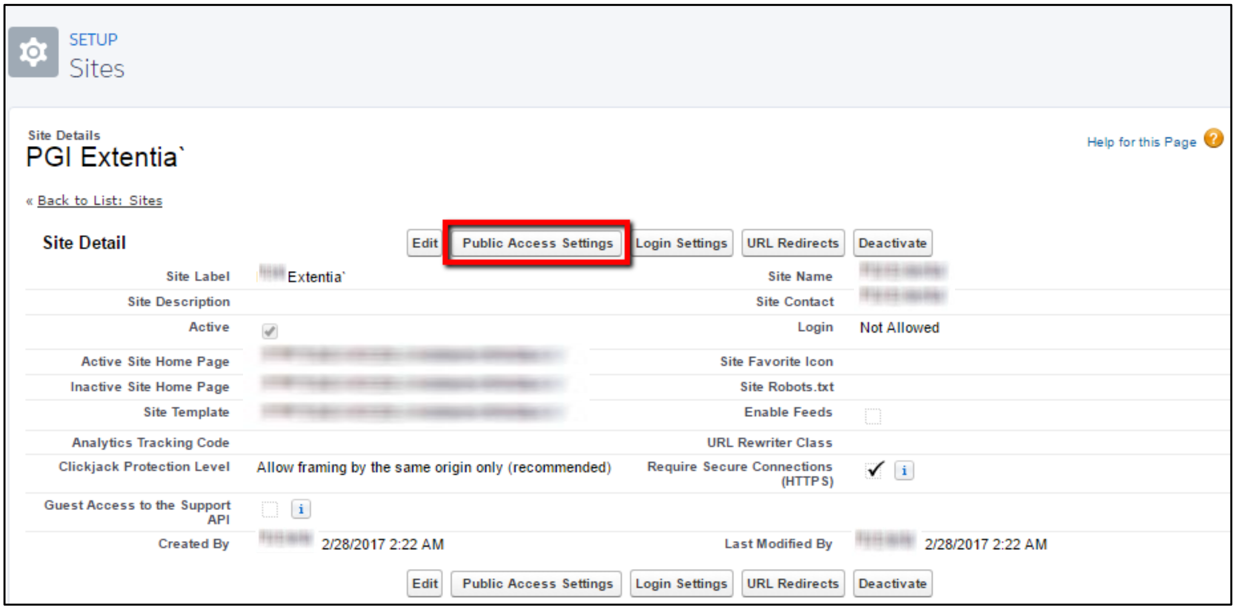
The standard objects – Accounts, Leads, and Contacts require Read Access.

To provide the requisite access to the standard Salesforce objects,

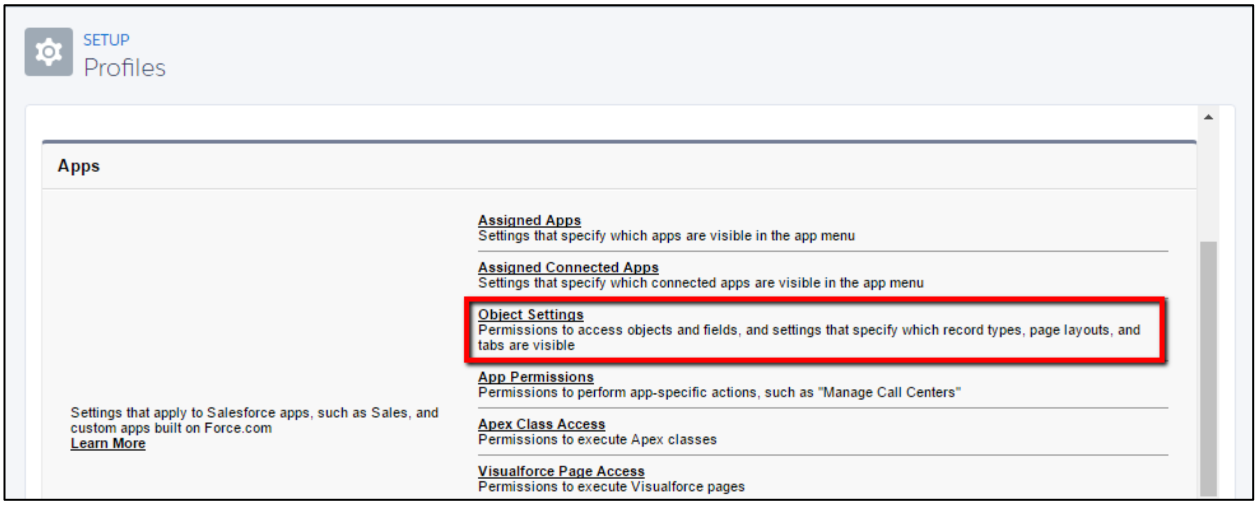
1. Open the **Site Label**.



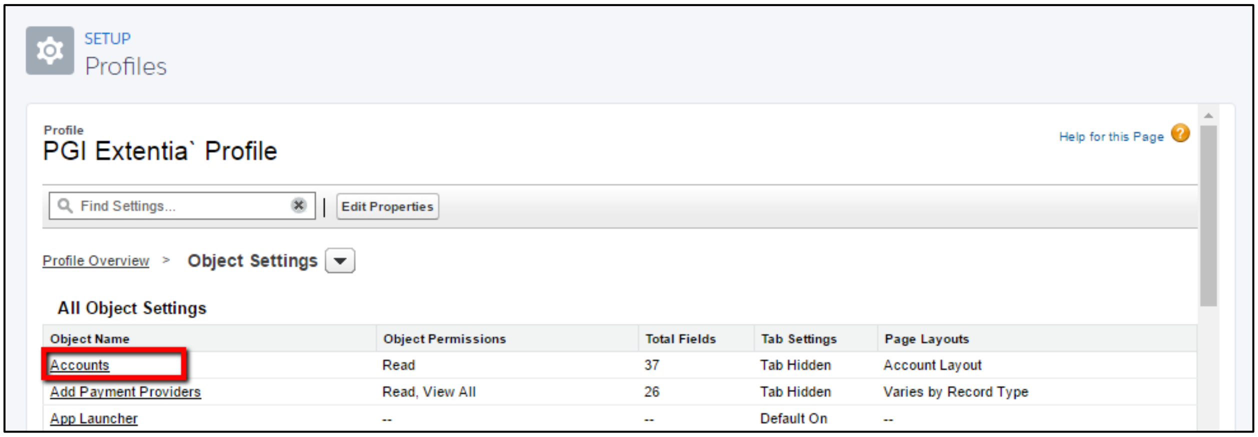
2. The **Site Details** page will be displayed. Click **Public Access Settings**.



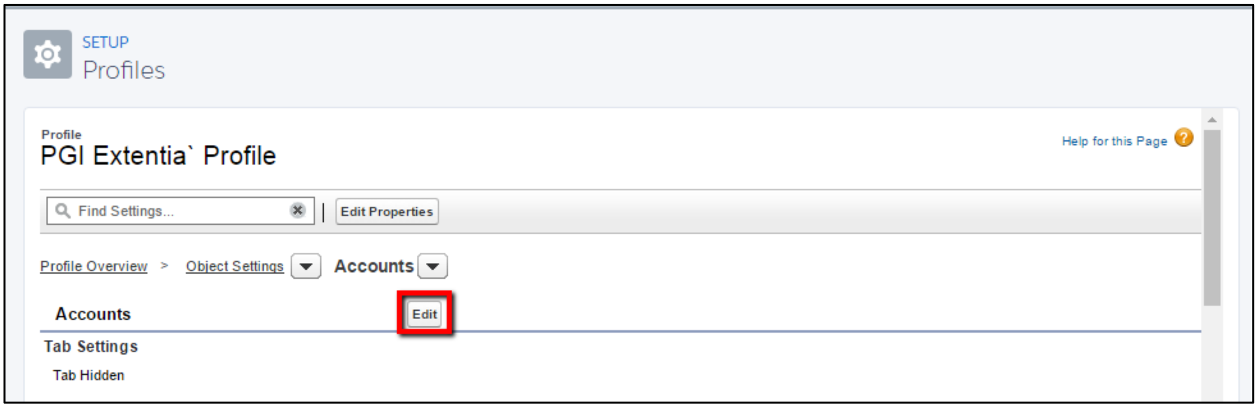
3. The **Profile** page will be displayed. Click **Object Settings**.



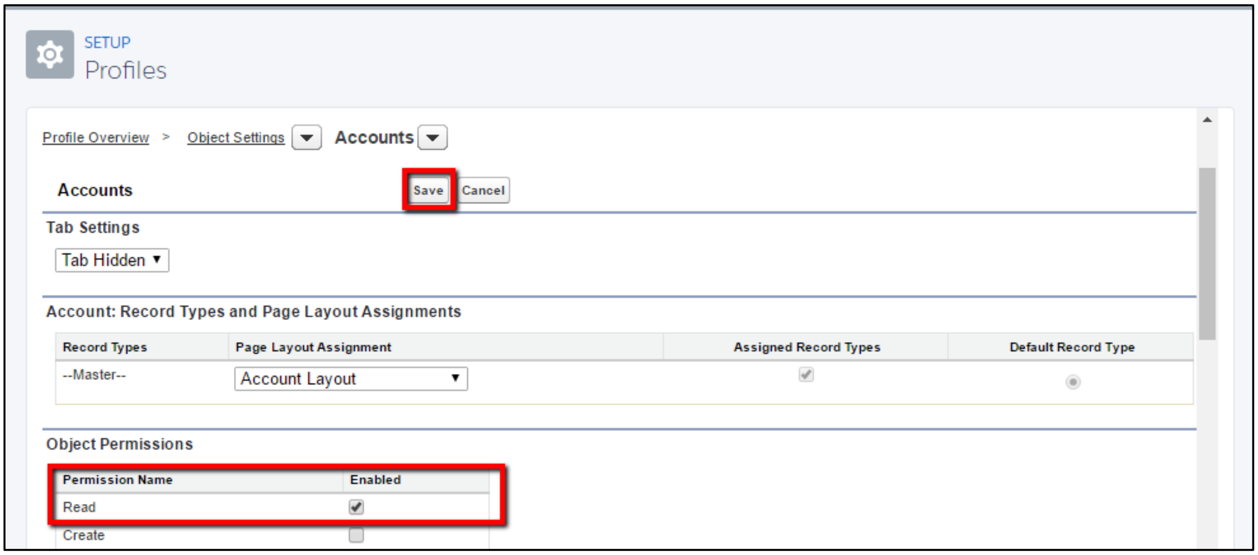
4. Click **Accounts** from the **Object Name** column.



5. Click **Edit**.



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



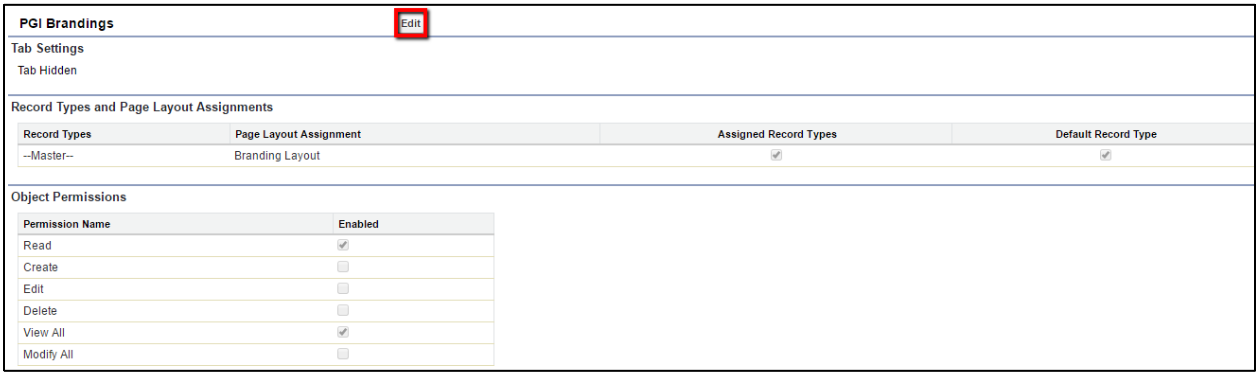
7. Repeat the above steps (#4, #5, and #6) for **Contacts** and **Leads** from the **Object Name** column.

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.



4. Click **Save**.

   Similarly, set the following access for the Custom Objects.

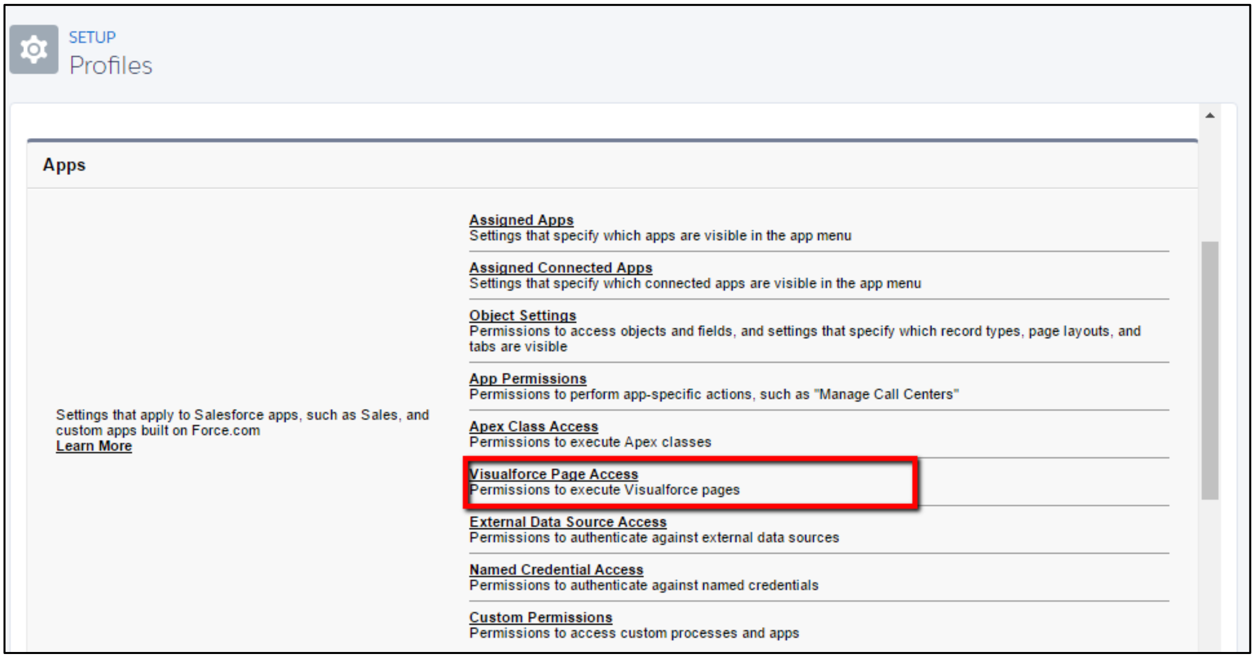
Sr. No	Custom Object Name	Permission(s)
1.	License Requests	Read, Edit, Create and View All
2.	Licenses	Read, Edit and View All
3.	Packages	Read and View All
4.	Package Versions	Read and View All
5.	Payment Plans and Pricing	Read and View All
6.	Payment Providers	Read and View All
7.	Transaction Details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

Visualforce Pages

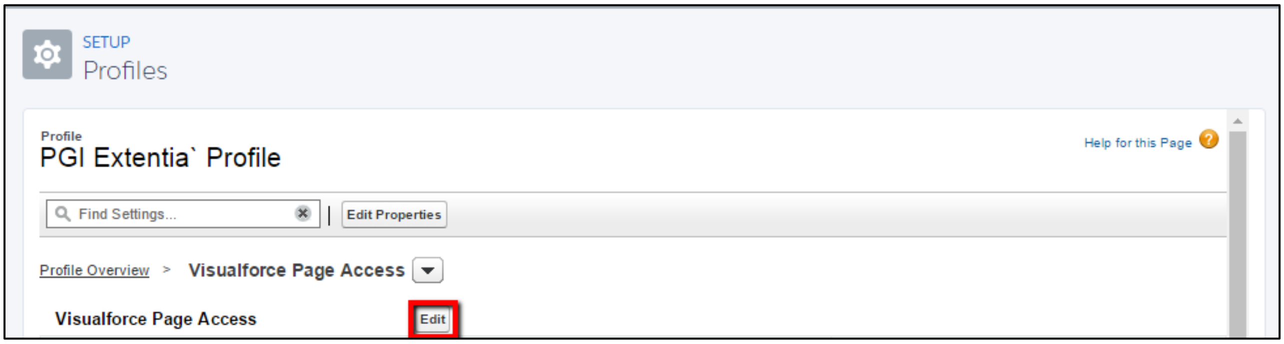
The next step is to enable the Visualforce pages.

To enable the Visualforce pages for the site,

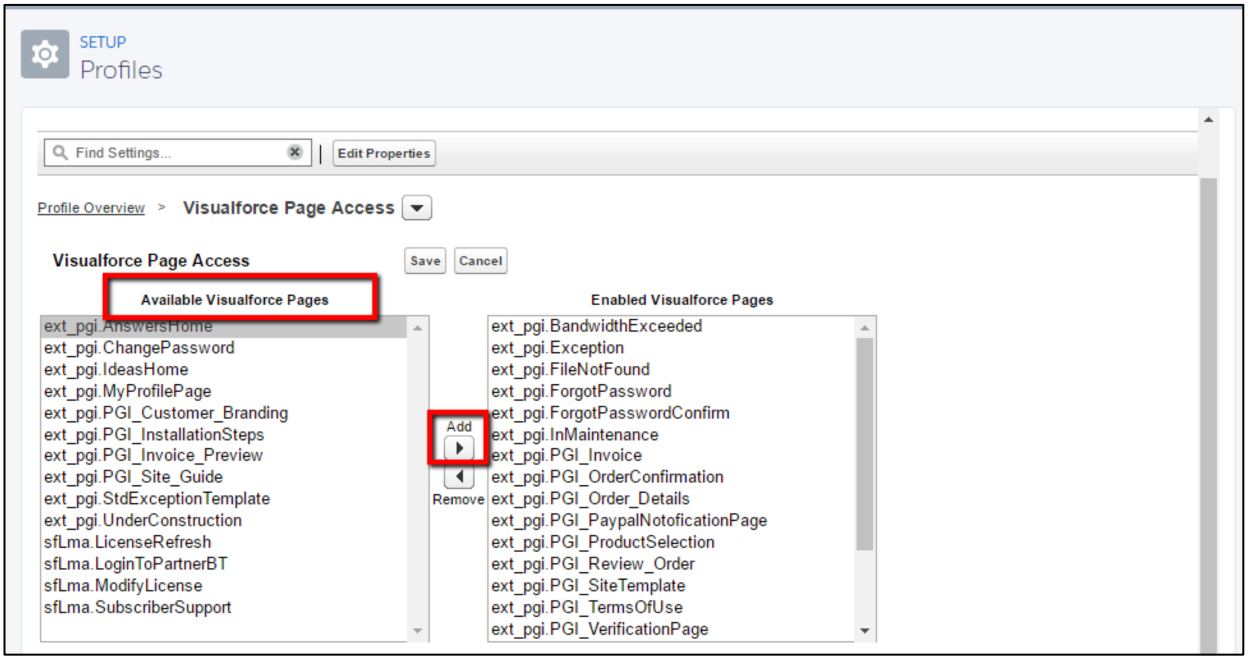
1. Navigate to the **Profile** page – refer to the steps in Standard Object Permission to access the Profile page.
2. Click **Visualforce Page Access**.



3. Click **Edit**.



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



Here are the Visualforce pages,

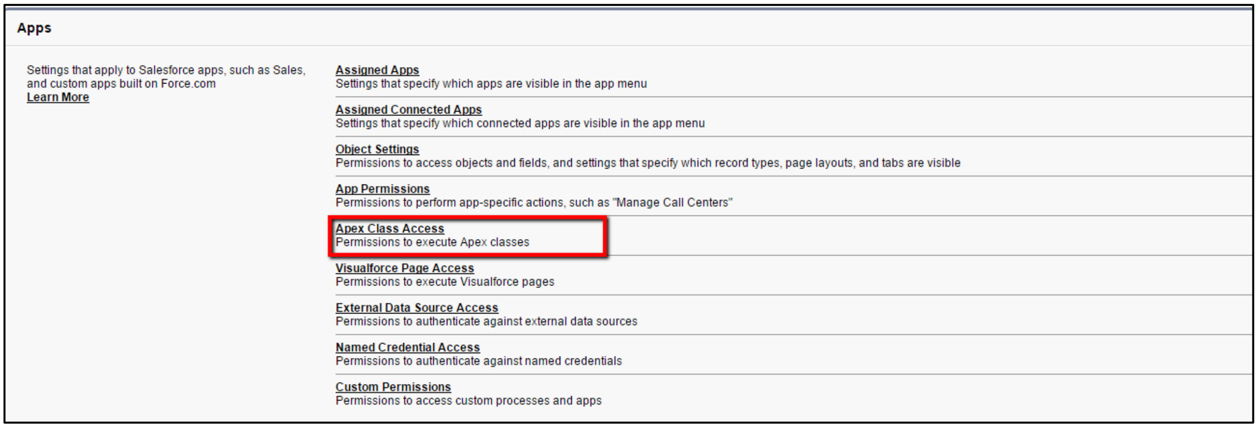
1. ext_pgi.PGI_VerificationPage	6. ext_pgi.PGI_ProductSelection
2. ext_pgi.PGI_Invoice	7. ext_pgi.PGI_Review_Order
3. ext_pgi.PGI_OrderConfirmation	8. ext_pgi.PGI_SiteTemplate
4. ext_pgi.PGI_Order_Details	9. ext_pgi.PGI_TermsOfUse
5. ext_pgi.PGI_PaypalNotoficationPage	

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

Apex Classes

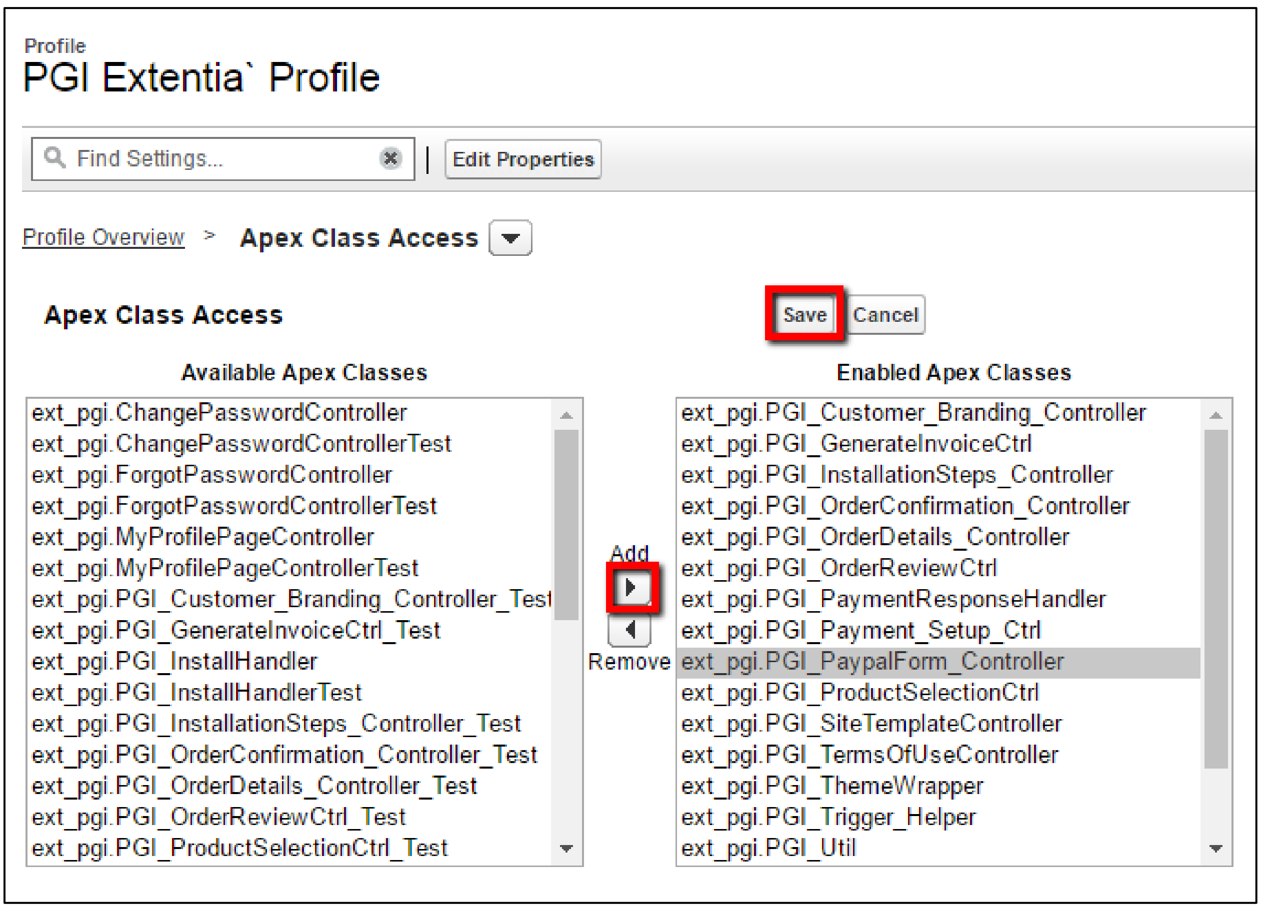
To enable the Apex classes,

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**.



3. Click **Edit**.

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



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	☑	☑
Amount after Discount	☐	☐
Contact	☑	☑
Created By	☑	☐
Discount Code	☐	☐
Invoice Amount	☑	☑
Last Modified By	☑	☐
License	☑	☐
License Request Name	☑	☐
No of Seats	☑	☑
Owner	☑	☑
Package	☑	☑
Payment Gateway	☑	☑
Payment Gateway Name	☑	☑
Payment Status	☑	☑
PayPal Subscription Id	☑	☐
Recurring	☑	☑
Related License ID	☑	☑
Subscription Id	☑	☑
Subscription Model	☑	☑
Term in Months	☑	☑
Transaction Initiated	☑	☐

5. Click **Save**.
6. 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 *except* – Help, Information Current As Of, Package Name, Package Version Number,

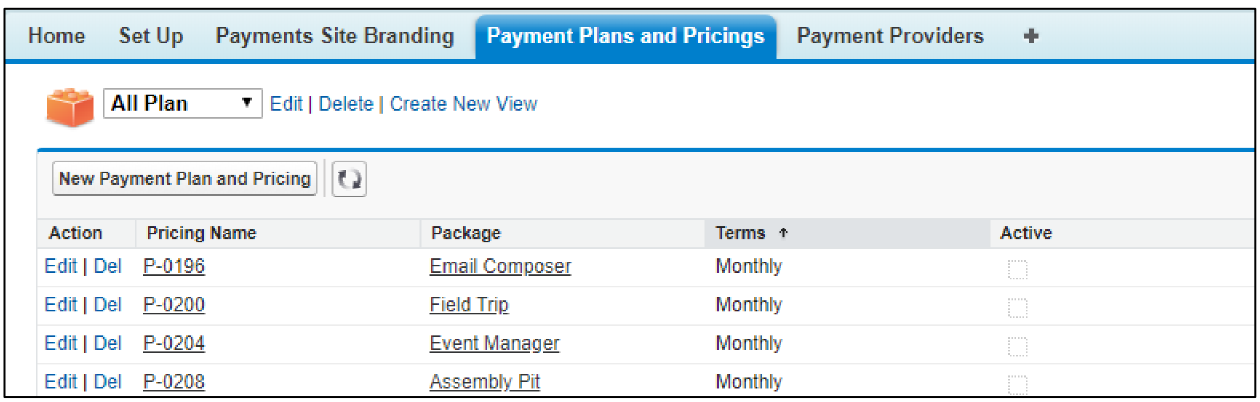
			Proxy User, Version Number
4.	PGI Brandings	None	All fields
5.	Manage Payment Plans and Pricing	None	All fields
6.	Add Payment Providers	None	All fields

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

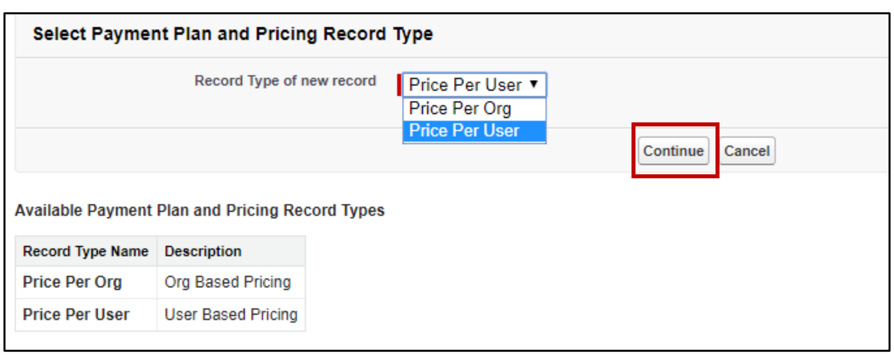
To complete the site setup before sharing the site URL with the App Users, please refer to the Set Up Payments App Builder User Guide.

Tier-based pricing setup

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



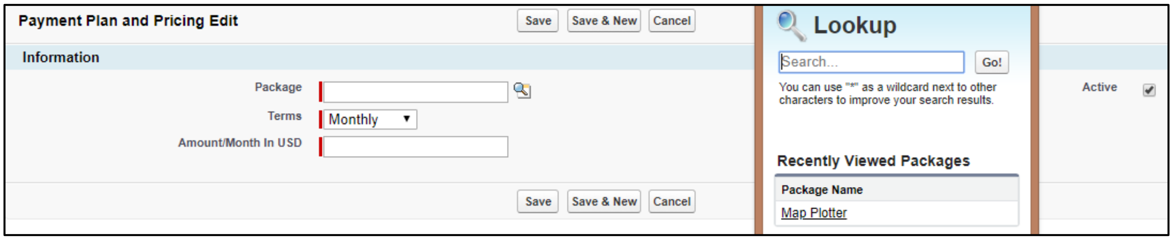
1. Click **New Payment Plan and Pricing**
2. Select the record type from the drop-down options: Price Per User, Price Per Org and click **Continue**



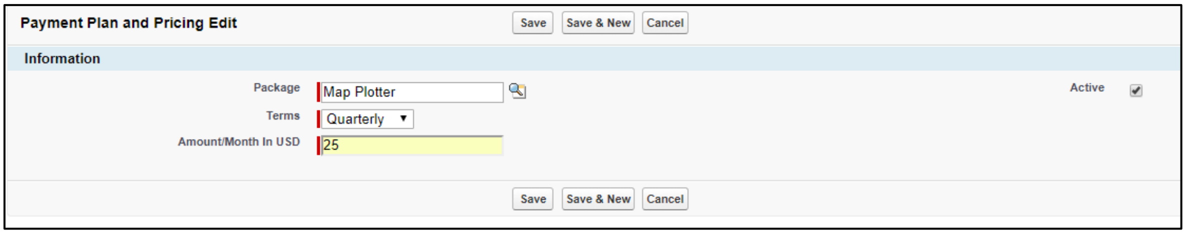
3. Based on the selected record type, the system will capture the pricing details on the next page.

Case 1: Price Per Org

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



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

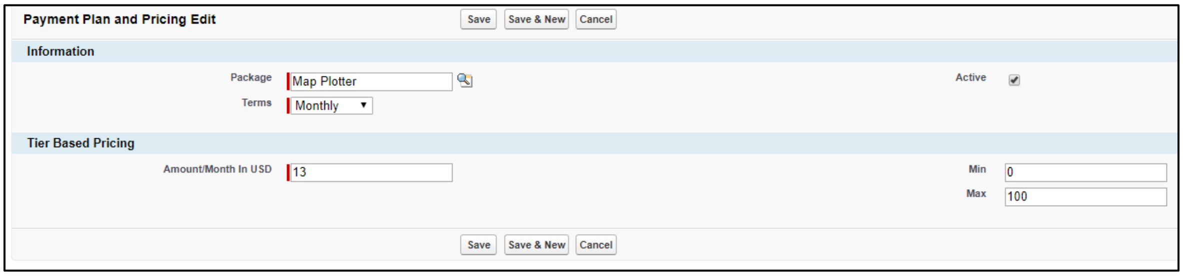


Note: At a time, only one payment plan for the selected package and type of term (monthly, quarterly, half-yearly and yearly) can be activated in the system. In case, the pricing model is duplicated, the system will generate an error.

Case 2: Price Per User

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

b. 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.