Chargent Connector

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Overview

With FormAssembly's Chargent Connector, you can easily process one-time credit card payments, set up recurring credit card payments, and integrate every payment with Salesforce. This connector must be set up on a form-by-form basis.

Provided you have Chargent installed through the Salesforce AppExchange, you can follow the steps below to configure the connector and begin processing payments.

We also recommend learning more about how you can use reCAPTCHA to prevent spam submissions to your form, and how connector labels can be useful in keeping your connectors organized.

> **Sensitive Data Notice**
> Credit Card Numbers and CVV Codes must be marked as Sensitive Data. Please click here to read more about these fields.

Getting Started

There are no definite restrictions on what your form may contain or what you may sell with it, but this service is better suited for simple situations, where:

- You have a limited number of types of items to sell.
- Items have a fixed price and a fixed or variable quantity.
- Shipping & handling fees and taxes are applied to the total price.

Here are a few examples:

- Selling intangible goods such as music (MP3s), software, eBooks, etc.
- Charging a membership or an admission fee.
- Charging a flat fee for consulting services.
- Accepting donations.
- Selling physical goods, to the extent that inventory is not an issue.

Requirements

You'll need the following:

- The Payment Connector add-on, for access to the Chargent Connector
- The Salesforce Connector add-on
- Chargent installed on your Salesforce AppExchange

If you are processing recurring charges, you will also need to enable tokenization on your Chargent gateway page within Salesforce.

Required Fields

As you build your form, make sure to collect the following **credit card information**:

- Credit card number
- Credit card expiration date (month and year in two separate fields)
- Credit card security code
- Card Type (Visa, Mastercard, Amex, and/or Discover)
- Cardholder's full name
- Cardholder's email address

If you are building your form from scratch, check out our predefined content to easily add a payment information section.

> **Note:** Chargent's API currently does not support ACH payments with the Ezdebit gateway. Please contact Chargent Support for more information.

Chargent Plans

Previously, Chargent offered three different package types, all of which required a slightly different configuration on the FormAssembly side. If you are using Chargent's legacy Opportunities or Cases packages, which stopped being distributed in 2017, the end of support for these packages is June 30, 2022.

If you are using a legacy package and wish to switch to the Chargent Orders Package, you will need to reload your Chargent Connector after the migration. Additionally, you may need to make changes to the associated Salesforce Connectors. The Opportunities Package requires the Salesforce Connector to create, lookup, or update an Opportunity record, while the Cases Package requires the same for a Case record. **These steps will no longer be required with the Chargent Orders Package**, so you may remove them.

Instead, the Chargent Orders Package will create a custom "Chargent Orders" object that will automatically be linked to any records created within the Chargent Connector. If you are using this package, you may continue to the **Configuration Steps** below.

Salesforce Connector Setup

As mentioned above, in addition to the Chargent Connector, you will need to configure a Salesforce Connector. Failure to add a Salesforce Connector will result in an error and the inability to process payments.

To begin, you should select the form you are working with and add the Salesforce Connector to the **Form Submitted** section of the timeline. The Salesforce Connector will need to be **positioned before the Chargent Connector** so that it will run prior to the Chargent Connector.

Once you have added the Salesforce Connector to the timeline, you will need to configure it following the typical guidelines.

> Note: Do not create a transaction object in your Salesforce Connector. The Chargent Connector will create transactions once it runs. A transaction object created from your Salesforce Connector will likely lead to

duplicate transactions showing up in Salesforce.

If you would like to associate the purchase with a particular record, such as an Account or a Contact, you will need to create, update, or look up the record prior to the charge. For more information, you can refer to this help document.

In addition to creating, updating, or looking up a record, you can add any additional steps to the connector that you would like to.

Configuration Steps

Once your form has been created, and you know what types of items or services you will be selling, you are ready to begin!

First, select the form you are working with and go to the **display options** tab. Make sure you have **Use SSL Encryption** checked, otherwise, you will receive an error when attempting to process payments.

Next, go to the **Connectors** page, and add the Chargent Connector to the **Form Submitted** portion of the timeline. Click **Configure.**
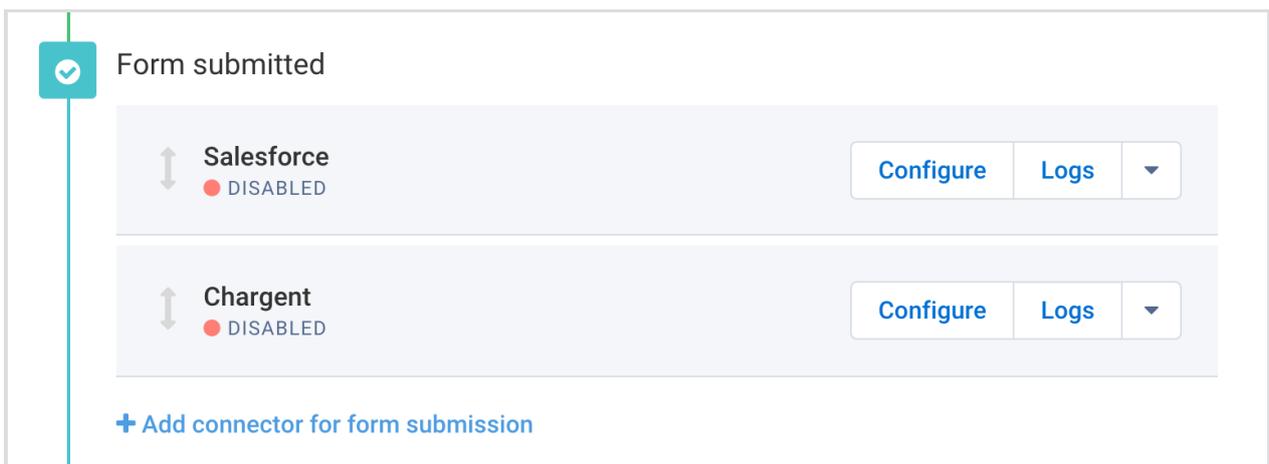
Form submitted

| | Salesforce ● DISABLED | | Configure | Logs | ▾ |

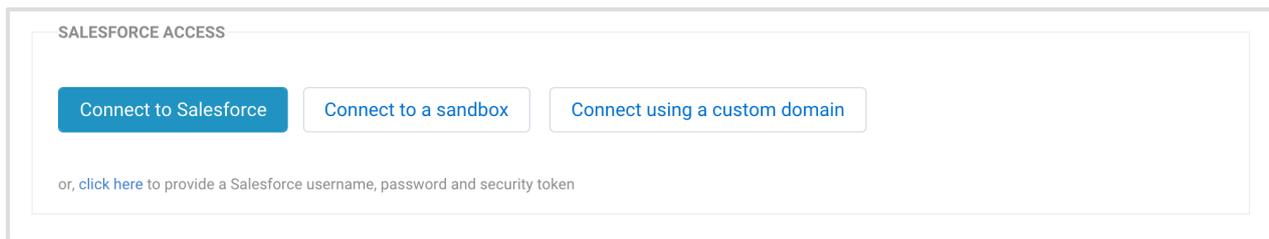| | Chargent ● DISABLED | | Configure | Logs | ▾ |

+ Add connector for form submission

Step 1. Salesforce Authentication

Within your Chargent Connector, you'll begin by selecting **Connect to Salesforce**. If you are

using a sandbox account or a custom domain, you should select the appropriate option instead.

Once you have selected **Connect to Salesforce** you will be automatically redirected to the Salesforce authentication page.

After entering your Salesforce credentials, you will be asked to **Allow Access** to FormAssembly. Click on **Allow** and you will be automatically redirected back to FormAssembly.

Once you have returned to the connector setup, you will see that your Salesforce Access has been configured to the credentials you entered. You may change this access at any time by clicking the **Change Access** button.
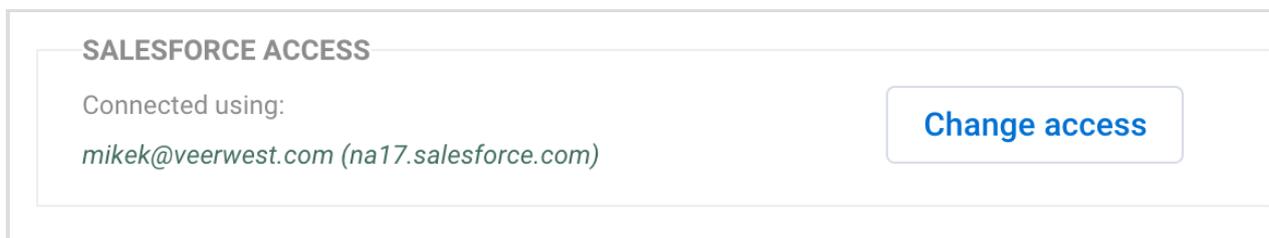
Step 2. Chargent Configuration

Once you've entered your Salesforce credentials, you'll be ready to start on your Chargent Configuration. If you have more than one gateway configured in Chargent, you will need to enter the **Gateway ID**. This is located in Salesforce in your Chargent configuration. Go to **Gateways** and find the ID for the specific gateway you are setting up.

> **Note**: Please ensure that you enter your Gateway ID in the Gateway ID field and not the text name you have given your Gateway. You can find your Gateway ID in the URL for your Gateway record, it will be the 10-digit number at the end of the URL.

> **Note**: In Chargent, a payment gateway is what processes payments - i.e. Stripe, PayPal, or another payment processing company. In Salesforce, Chargent can work with many different gateways, so if you have more than one configured in Salesforce/Chargent, you must tell the connector which one to use. If you only have one payment gateway configured, you can leave the Gateway ID setting empty and the one you have will be used

by default.

Your **Transaction Package** will show which of the three Chargent packages you have purchased, provided you entered your Salesforce credentials correctly in Step 1.

For **Payment Method,** you will need to select if you are accepting payments with Credit Card or with Check/eCheck.

Finally, for **Currency,** you will need to select if the value will be defined in the form or in the connector.

STEP 2 OF 6 - CHARGENT CONFIGURATION

GATEWAY ID

If more than one gateway configured in Chargent, enter the Gateway ID.

TRANSACTION PACKAGE *

Please enter your Salesforce Authentication settings   Reload

PAYMENT METHOD *

Credit Card ⏹

CURRENCY

Do not use ⏹

Step 3. Credit Card Information

Once you've entered your credentials, you'll begin your **field mapping,** so that the connector will know which fields in the form to pull information from. To do this, for each dropdown menu within Credit Card Information, select the field in your form that matches the label of the information to be pulled.

CREDIT CARD NUMBER *

Donation or Pledge? ▼

Payment Information

Name on Card   tfa_2221

Card Number   tfa_2222

MM   tfa_2224

YY   tfa_2225

Code

CARD EXPIRATION (YEAR) *

▼

CARD TYPE *

▼

Note: Only the credit card number and the expiration month and year are required for the Chargent Connector. However, each payment gateway has different information required for the gateway. You must collect all the information that is required by the specific payment gateway that you are using to process payments.

Step 4. Customer Billing Address

Once you have mapped the credit card information, you may do the same for the customer's billing information, although this information is optional and not required. Make selections in the dropdown menus for each field and select **where** you will define your values. In general, these values will be fields **defined in the form**, and if you choose to map this information, you will need to select which form field corresponds with which value.

☑ Collect billing information

FIRST NAME

defined in the form: ⇅

▾

LAST NAME

defined in the form: ⇅

▾

EMAIL

defined in the form: ⇅

▾

Step 5. Shipping Information

If you choose to collect shipping information, you'll need to define your recipient's name either in the connector or in the form. Additionally, you can choose to use the billing information entered in the Billing Details section above or map separate shipping information fields.

STEP 5 OF 6 - SHIPPING DETAILS

☑ Collect shipping information

USE BILLING DETAILS AS SHIPPING DETAILS

defined in the form: ⇅

▾

FIRST NAME

defined in the form: ⇅

▾

Step 6. Charge Information

Here, you will need to choose if you will be accepting a one-time charge or recurring billing.

One Time Charge

If you select O**ne Time Charge**, you will need to configure the item name, unit price, description, and quantity ordered. All of these can be either configured in the form or within the connector.

> **Note**: The **item name** and **description** fields are for your records only and are **not sent to Salesforce**.

You can also use the formula editor to define values in the connector.

Using repeated fields and sections within your form will work as expected for single, one-time purchases. Users can add additional repeated fields or sections in your form to multiply the number of one-time items they are purchasing. You can read about using repeated fields here.

STEP 6 OF 6 - CHARGE

CHARGE TYPE *

| One Time Charge | ⇕ |

ITEM

ITEM NAME *

| | ƒ |

UNIT PRICE *

| please select... | ⇕ |

QUANTITY ORDERED *

| please select... | ⇕ |

DESCRIPTION

| do not use | ⇕ |

🗑 Remove

Recurring Billing

For **Recurring Billing**, you will need to configure the payment frequency and charge amount. You can also choose to set up the payment max count if you would like your recurring payment to have an end date.

Additionally, in order to process recurring charges, **you will need to enable tokenization on your Chargent gateway page within Salesforce.**

STEP 6 OF 6 - CHARGE

CHARGE TYPE *

| Recurring Billing | ⬍ |

PAYMENT FREQUENCY *

| Daily - Each day | ⬍ |

PAYMENT MAX COUNT

| Unending | ⬍ |

If specified, Chargent will stop processing transactions when the number of **approved recurring** transactions equals the value in this field.

CHARGE AMOUNT *

| please select... | ⬍ |

Step 7. Save the Connector

When you save your connector, you may see a message that some fields in your form were changed. This is due to the automatic validation feature, which will add validation to any field that did not have one.

Processing Single and Recurring Payments with a Form

It is possible to process both single and recurring payments within a form. In order to enable this setup, you will have to add two separate Chargent Connectors to your connector timeline. This way, you can configure one of the connectors to run for single payments, and the other connector to run for recurring payments. You can read more about this setup here.

For recurring charges, the Chargent connector will only send transaction information to Salesforce and Chargent upon form submission. Therefore, any additional transaction records that are created will be a result of the default Chargent behavior within Salesforce.

Chargent Connector Logs

The Chargent Connector Logs will save information that may be useful depending on your use case and for troubleshooting purposes. Within the logs you can find:

- which opportunity/case object the connector detected to attach a new charge object to
- the ID of the new charge object that the connector created
- the ID of a successful transaction (if any)
- whether billing and/or shipping address has been collected from the form

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Using Chargent to Authorize Credit Cards

It is also possible to use the Chargent Connector to authorize credit cards, rather than billing or charging a credit card. This can be useful if you would like to make sure a card is authorized to be charged prior to actually charging the credit card.

Authorizing a card through Chargent is only available for one-time purchases, and cannot be used for ACH/eCheck or recurring charges. If you do select to authorize a card for a one-time purchase, it will **not** be charged.

In order to set the connector to authorize a card, you will need to change the **Action** under step 6 to **Authorize Only.**

Once a card has been authorized successfully, you will see the transaction ID for the authorization in your Chargent Connector Log.

Troubleshooting the Chargent Connector

If you are receiving the error "Please choose an Active Gateway record; status code = FIELD_FILTER_VALIDATION_EXCEPTION", make sure your Chargent Gateway is **activated**.

Once your Chargent Gateway is active, you can try reprocessing the response that caused the error to make sure the error is resolved.

Aliases

Below are the fields that Chargent automatically adds when you add a Chargent Connector to your form. You can use these as field aliases in your connector.

Chargent Order Object ID	*No answer given*
Chargent Order ID	*No answer given*
Chargent Transaction Object ID	*No answer given*
Chargent Case ID	*No answer given*
Chargent Opportunity ID	*No answer given*
Chargent Order Object ID	**a1U0B000004OEvnUAG**
Chargent Order ID	**ORD-000000088**
Chargent Transaction Object ID	**TRX-000000080**
Chargent Case ID	*No answer given*
Chargent Opportunity ID	*No answer given*

Map the aliases only for those fields that are actually being populated with values upon submission. The easiest way to do this is to count.

Once you have your aliases, you will need to open the Salesforce Connector that is set up**after** the Chargent Connector in the connector timeline.

In the screenshot above, you'd be able to use the following:

- %%CHARGENT_ORDER_OBJECT_ID_**XXX**%%
- %%CHARGENT_ORDER_ID_**XXX**%%
- %%CHARGENT_TRANSACTION_OBJECT_ID_**XXX**%%