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 is available on Professional, Premier, and Enterprise plans, and 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

In addition to a FormAssembly account, you'll also need 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 in a payment information section. Or, you can also start with one of our Templates, and customize it to your specific **needs.**

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

Chargent Plans and Salesforce Setup

Before configuring the Chargent connector, it is important to understand that Chargent offers three different package types, all of which require a slightly different configuration on the FormAssembly side.

Regardless of the package you have purchased, you will also need to configure a Salesforce connector to run prior to your Chargent connector. This Salesforce connector will need to be setup in addition to the Chargent connector. Details on that setup can be found below.

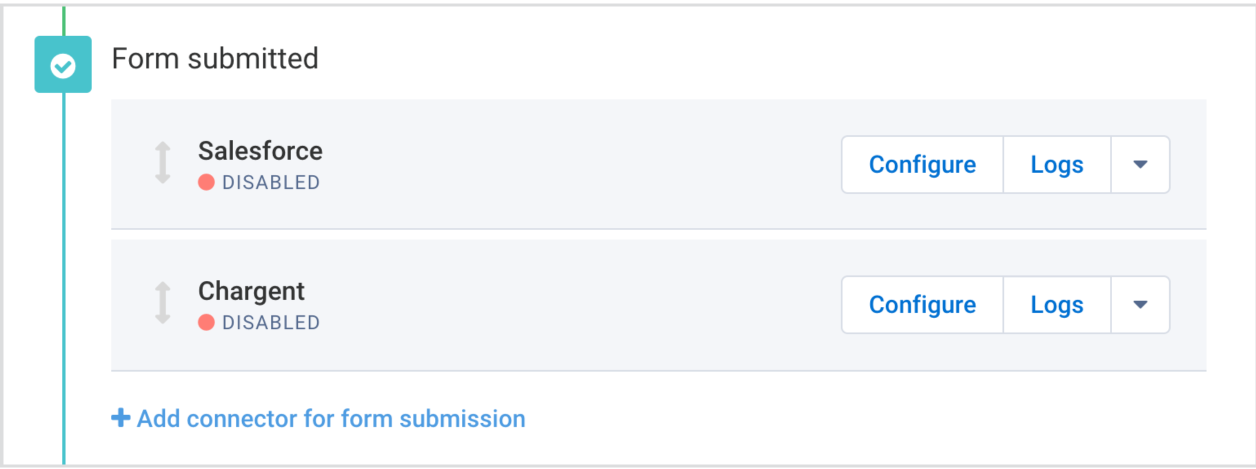
if you have purchased the **Chargent Order Package** then you can see this page for additional requirements and details.

The Chargent Order 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 as well. 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 into the **Form Submitted** section of the timeline. In the end, the Salesforce connector will need to be **on top of 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: You should not create a transaction object in your Salesforce connector. The Chargent connector will create transactions once it is run. If you do have a transaction object set to be created from your Salesforce connector, this will most likely lead to duplicate transactions showing up in Salesforce.

Additionally, if you have purchased the **Opportunities Package** you will need to either create, update, or lookup an opportunity at some point within your Salesforce connector. This is how the Chargent connector will know which Opportunity record to link the purchase to.

Likewise, if you have purchased the **Cases Packages** you will need to either create, update, or lookup a case for the same reason.

In addition to creating, updating, or looking up an opportunity or case, you can add any additional steps to the connector that you would like to. The Chargent connector does not change the setup of the Salesforce connector in any way, other than adding the necessity of an Opportunity or Case object as mentioned above.

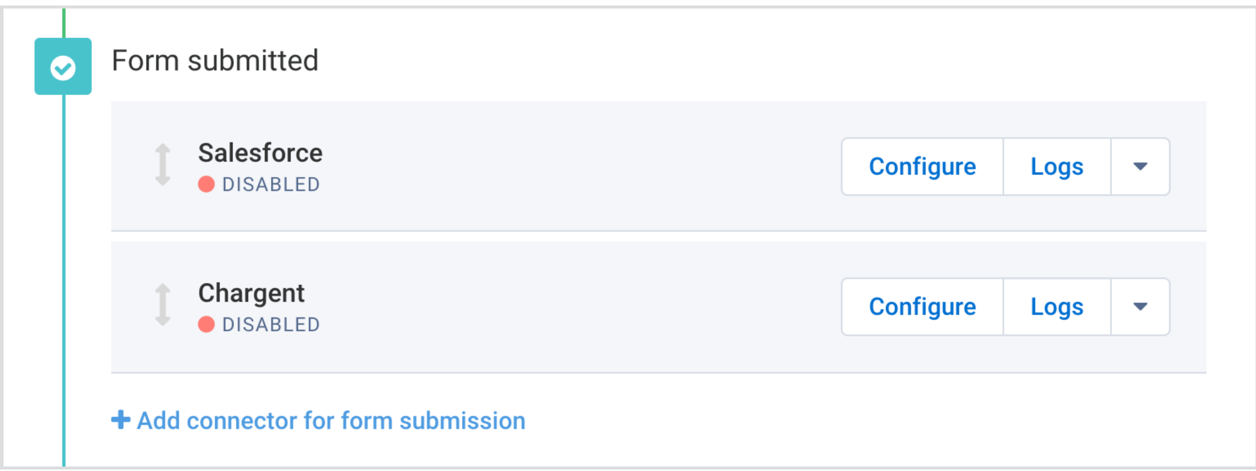
Configuration Steps

- Step 1: Salesforce Authentication
- Step 2: Chargent Configuration
- Step 3. Credit Card Information
- Step 4. Billing Details
- Step 5. Shipping Details
- Step 6. Charge Information

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.

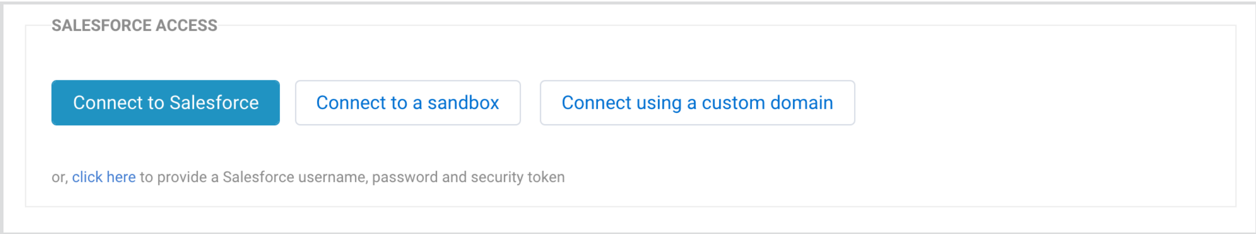
Next, go to the **Connectors** page, and add the Chargent into the **Form Submitted** portion of the timeline. Click **Configure.**



Step 1. Salesforce Authentication

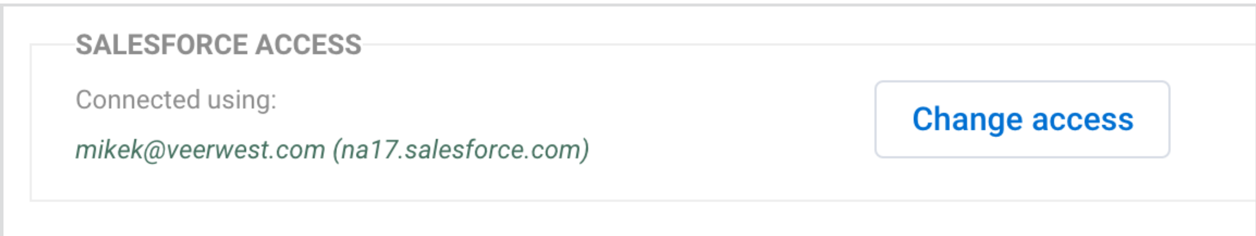
Within your Chargent connector, you'll begin by selecting **Connect to Salesforce** unless you are using a sandbox account or a custom domain, in which case you should select the appropriate option.

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 page, you will see that your Salesforce Access has been configured to the credentials you just entered. You can change this access at any time by clicking on 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** which can be found on the Salesforce side in your Chargent configuration by going to **Gateways** and finding the ID for the specific Gateway you are setting up.

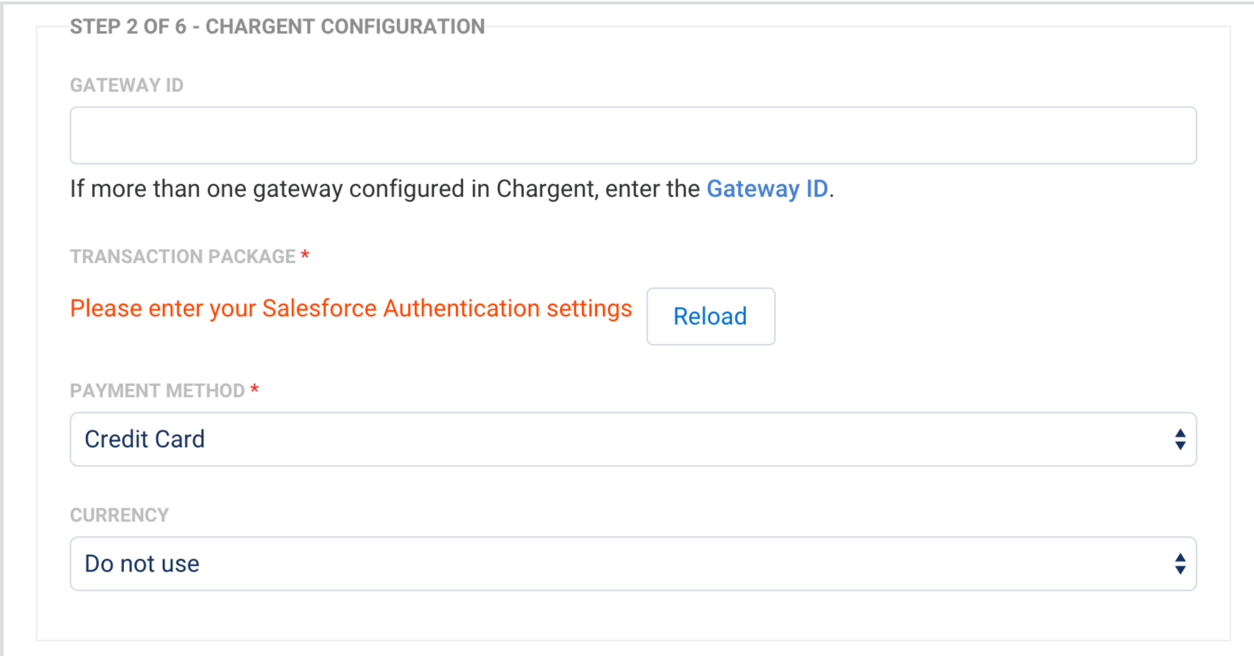
Please Note:

In Chargent, a payment gateway is what processes payments - i.e. Stripe or 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 have to tell the connector which one to use. However, 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 3 Chargent packages you have purchased, provided you entered in 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

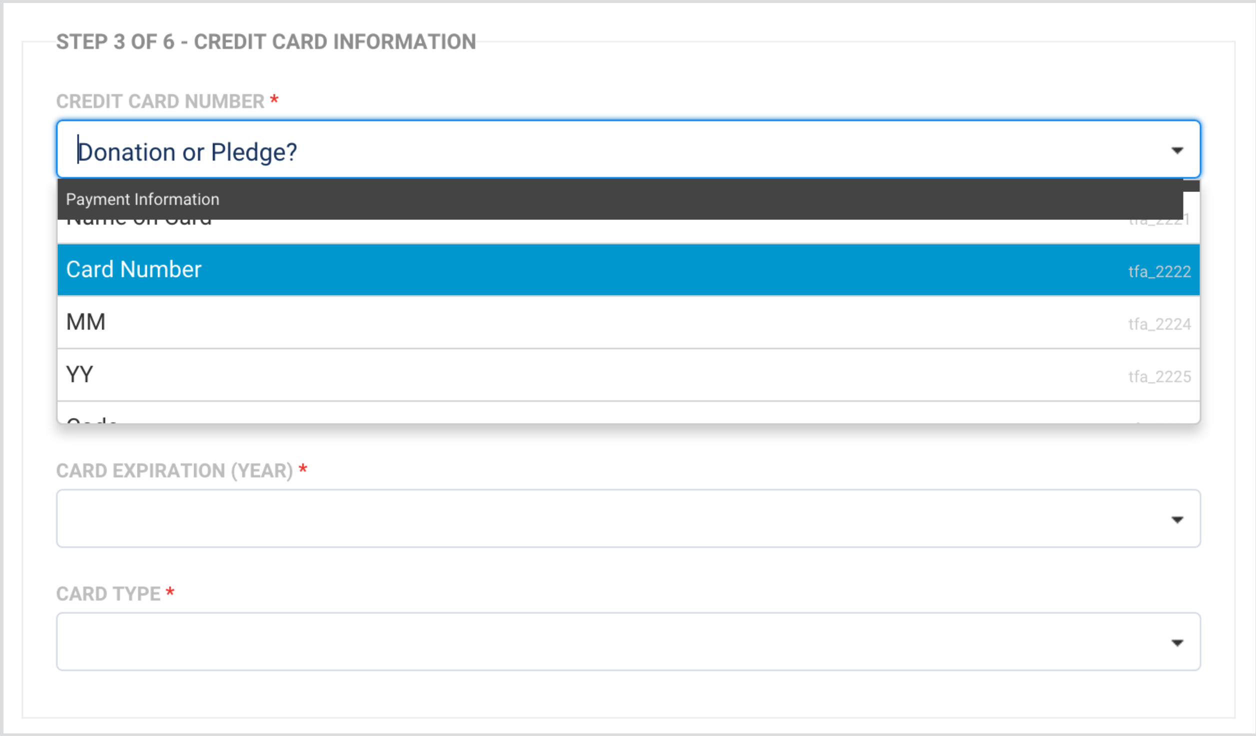
Finally, for **Currency** you will need to select if the value will be defined in the form or in the connector.



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.

Step 3. Credit Card Information

Once you've entered your credentials, you'll need to begin your field mapping so that the connector will know which fields in the form to pull information from. To do this, click on the dropdown menu next to each field and select the field in your form where this information will be entered.



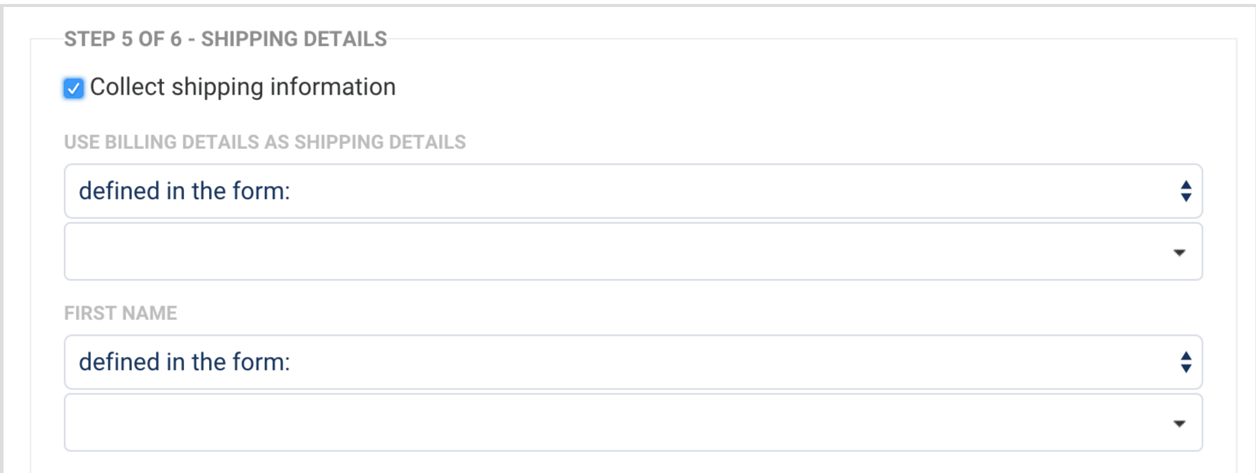
Note: Please note that only the credit card number and the expiration month and year are required for the connector. However, each payment gateway has different information that is required. Therefore, you will need to collect all the information that is required by the specific payment gateway that you are using to process payments.

Step 4. Customer Billing Address

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

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 above, or map separate shipping information fields as well.

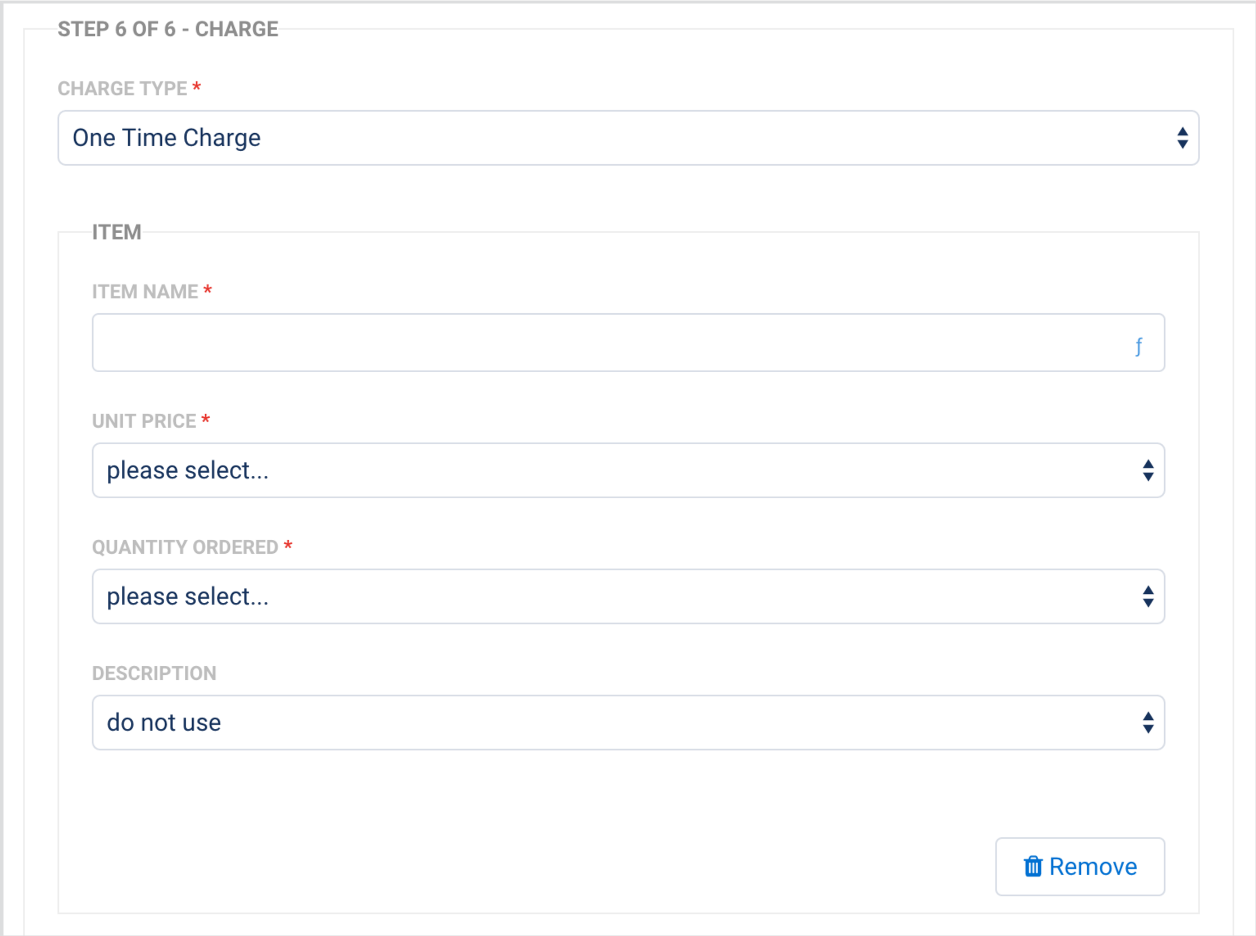


Step 6. Charge Information

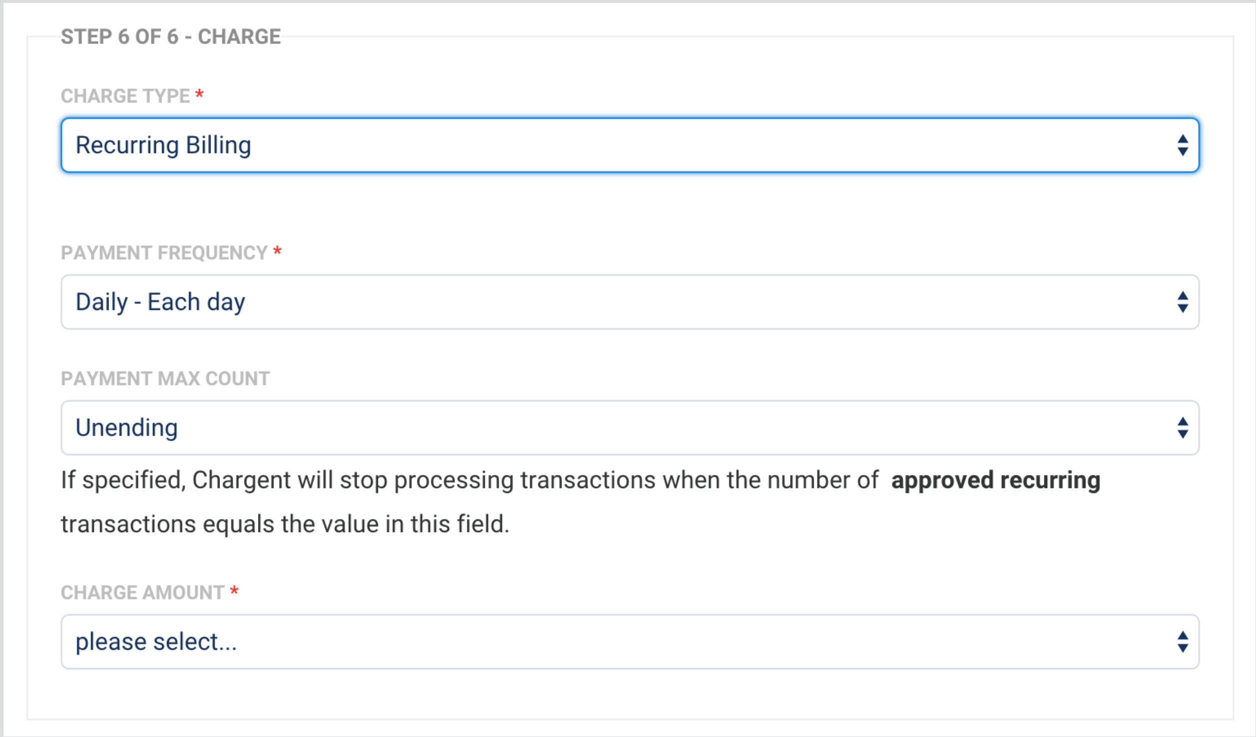
For Step 6 you will need to choose if you will be accepting one time or recurring charges. If you select a **one time charge**, you will need to configure the item name, unit price, description, and quantity ordered. All of these can be either configured in the form or within the connector: The **item**

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.



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



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 multiple the quantity of one-time items they are purchasing. You can read about using repeated fields here.

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 a validation to any field that did not have one.

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

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

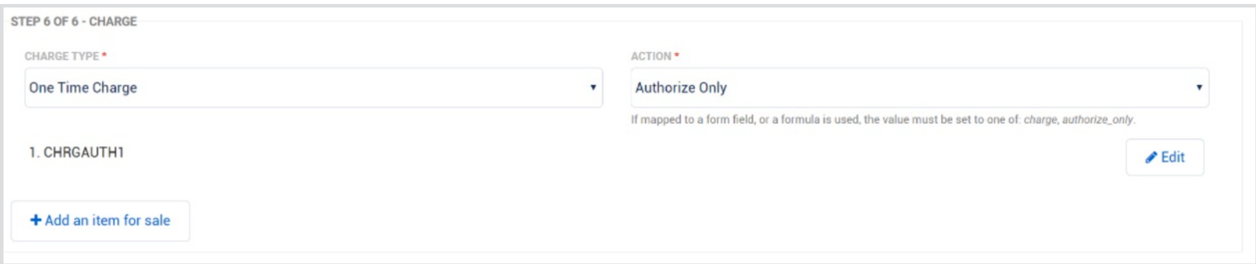
The Chargent Connector Logs will save information that may be useful depending on your use-case and for troubleshooting purposes. Within the logs you can find: which opportunity/case object the connector detected to attach a new charge object to, the ID of the new charge object that the connector created, the ID of a successful transaction (if any), and whether billing and/or shipping address has been collected from the form.

Using Chargent to Authorize Credit Cards

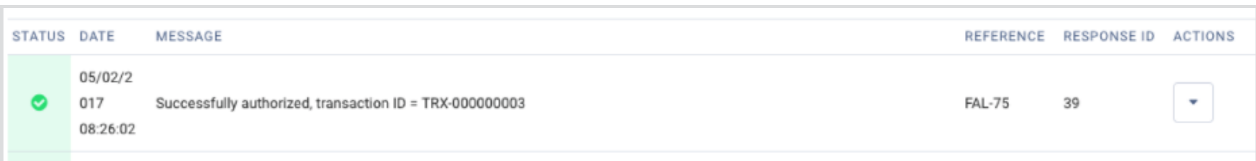
It is also possible to use the Chargent connector to authorize credit cards, rather than billing or charging a credit card. This can be useful if you would like to make sure a card is authorized to be charged, prior to actually charging the credit card.

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" then you will need to make sure to activate your Chargent

Gateway.

Once your Chargent Gateway has been activated, you can try reprocessing the response that caused the error in order to make sure that it has been resolved.

Aliases

Below are the fields that Chargent automatically adds when you add a Chargent Connector to your form. You can utilize 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*

You will only want to map the aliases 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 setup **after** the Chargent connector in the connector timeline.

In the above screenshot, you'd be able to use %%CHARGENT_ORDER_OBJECT_ID_XXX%%, %%CHARGENT_ORDER_ID_XXX%%, and %%CHARGENT_TRANSACTION_OBJECT_ID_XXX%%
