

Using Chargent with the Orders Package

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Introduction

When working with the Chargent Orders package, Salesforce records will be automatically created. Even though your record will be automatically created, **you are still required to run the Salesforce connector prior to the Chargent connector** in order for the charge to be associated with that object. This is the same setup for all [Chargent packages](#).

Working with Account Records

If you would like for the record created with the Orders package to be associated with an Account record, you will need to create, update, or look up the account in a Salesforce connector that runs **before** the Chargent connector.

If you do this, the account that is created or updated will automatically be associated with the charge (i.e. the Account field on the charge object will be set to the Account ID).

Working with Opportunity or Contact Records

Associating a charge with an Opportunity or Contact record requires some

additional steps. For these records, you will need to set up the association in a Salesforce connector that runs **after** the Chargent connector, and you will need to use the form [field aliases](#) to associate the charge information to the record you want to work with.

When you add your Chargent connector to a form, hidden fields will automatically be added at the end of the form. You can find the aliases for these fields at the bottom of the **notifications** page for that specific form. We recommend that you submit a test response, and see which specific aliases are populated with values. These are the aliases that you will want to map in your connector. For example:

Chargent Order Object ID	<i>No answer given</i>
Chargent Order ID	<i>No answer given</i>
Chargent Transaction Object ID	<i>No answer given</i>
Chargent Case ID	<i>No answer given</i>
Chargent Opportunity ID	<i>No answer given</i>
Chargent Order Object ID	a1U0B0000040EvnUAG
Chargent Order ID	ORD-000000088
Chargent Transaction Object ID	TRX-000000080
Chargent Case ID	<i>No answer given</i>
Chargent Opportunity ID	<i>No answer given</i>

In the above example, you would 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. So in the example above, the "Chargent Order Object ID" that is populated would be the second "Chargent Order Object ID" when looking at your alias page.

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

You will then need to look up the Record ID field of the ChargentOrders__ChargentOrder__c record using the CHARGENT_ORDER_OBJECT_IDXXXX alias from the previous step. You will **not** want to use the alias for the similarly named Order ID, instead, you want the Order Object ID.

Once you map the Order Object ID, you will be able to look up the appropriate record created by the Chargent connector and can then map any additional fields you want to. For example:

The screenshot shows a configuration window for a connector step titled "2.1 - Update ChargentOrders__ChargentOrder__c record".

LOOKUP #4
Find a ChargentOrders__ChargentOrder__c record to update using:
☁ Record ID = Formula: %%CHARGENT_ORDER_OBJECT_ID_228%%

IF NO MATCH	IF ONE MATCH	IF MULTIPLE MATCHES
Skip this object and any dependent	Update record	Skip this object and any dependent

FIELD MAPPING

THESE SALESFORCE FIELDS:	GET THEIR VALUE FROM:
Opportunity	Record ID of 2. Opportunity
Billing Email	Billing Email

Note: Since the Chargent connector must be paired with the Salesforce connector, working with Chargent can often add additional complexity. If you run into any difficulty at all, please do not hesitate to contact our support team and we will be happy to help you with your setup.