

Worldpay User Guide

*Depending on your Admin configuration, you will be using Leads or Opportunities.

*In this example we will be using Opportunities.

Go to your Opportunities and create a new one or select an existing one.

You should see a Worldpay Tab with the application to send the record.

The screenshot displays the Salesforce user interface. At the top, there is a navigation bar with a search field and a menu containing 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Reports', 'Chatter', 'Groups', 'Calendar', 'People', and 'Cases'. Below this, a sub-header for 'Opportunity' shows 'Acme 100 Widgets' with fields for 'Account Name' (Test Acc), 'Close Date' (5/28/2024), 'Amount', and 'Opportunity Owner' (V2 Test). A progress bar indicates the current stage is 'Prospecting', followed by 'Qualification', 'Needs Analysis', 'Value Proposition', 'Id. Decision Makers', 'Perception Analysis', and 'Proposal/Price Qu'. The main content area is titled 'Worldpay' and 'Details'. It contains four sections: 'Business Information' (DBA Name: Acme 100 Widgets), 'Control Owner Information' (Email: edson.garcia@perficient.com, First Name: V2, Last Name: Test, State: --None--), 'Installation Contact Information' (Email: edson.garcia@perficient.com, First Name: V2, Last Name: Test), and 'Sales Agent Information' (Email: edson.garcia@perficient.com, First Name: V2, Last Name: Test). At the bottom, there are 'Cancel' and 'Save' buttons, and a 'Submit Opportunity to Worldpay' button.

*Your admin already did a mapping of the fields, in this example most of the fields are pulled from your user details.

Fill the required fields and save, you will see a Success message and the Submit button activated.

Opportunity

Acme 100 Widgets

Success! Record has been saved successfully!

Account Name

Test Acc

Close Date

5/28/2024

Amount

Opportunity Owner

V2 Test

Prospecting

Qualification

Needs Analysis

Value Proposition

Id. Decision Makers

Perception Analysis

Proposal/Price Quo

Worldpay

Details

Business Information

DBA Name

Acme 100 Widgets

Control Owner Information

Email

edson.garcia@perficient.com

Last Name

Test

State

AK

First Name

V2

Phone Number

1234567890

Installation Contact Information

Email

edson.garcia@perficient.com

Last Name

Test

First Name

V2

Sales Agent Information

Email

edson.garcia@perficient.com

Last Name

Test

First Name

V2

Phone Number

9876543210

Cancel

Save

Submit Opportunity to Worldpay

When clicking Submit, the app will load a success message will be displayed and then present you with a new screen displaying the values sent.

Search...

Sales

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Chatter

Groups

Calendar

People

Cases

Opportunity

Acme 100 Widgets

Opportunity successfully submitted to Worldpay

Account Name

Test Acc

Close Date

5/28/2024

Amount

Opportunity Owner

V2 Test

Prospecting

Qualification

Needs Analysis

Value Proposition

Id. Decision Makers

Perception Analysis

Proposal/Price Quo

Worldpay

Details

Business Information

DBA Name

Acme 100 Widgets

Refresh Opportunity Status

New

Submitted

Lead Submitted

Lead Contacted

App in Progress

Lead Closed

App Submitted

Enrolled

Processing

Other

Status History

Recent Comments

Date

Status

Date

Comment

Control Owner Information

Installation Contact Information

Sales Agent Information

*If you get any error, your admin has the ability to check the error log.

You can click the Refresh Status button to retrieve the latest Status and Comments made on the record.

Sales

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Chatter

Groups

Calendar

People

Cases

Search...

Opportunity

Acme 100 Widgets

Account Name

Test Acc

Close Date

5/28/2024

Amount

Opportunity Owner

V2 Test

Prospecting

Qualification

Needs Analysis

Value Proposition

Id. Decision Makers

Perception Analysis

Proposal/Price Quo

Worldpay

Details

Business Information

DBA Name

Acme 100 Widgets

Refresh Opportunity Status

Submitted

Lead Submitted

Lead Contacted

App in Progress

Lead Closed

App Submitted

Enrolled

Processing

Other

Status History

Date

Status

2024-05-27 19:34:55

Submitted

Recent Comments

Date

Comment

Control Owner Information

Installation Contact Information

Sales Agent Information