

# Cybersource for Salesforce Billing Technical Guide



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**Release:** May 2026

**Version:** 1.6

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## 1. Introduction

- **Description:** Cybersource, a Visa solution, is the only global, modular payment management platform built on secure Visa infrastructure with the payment reach and fraud insights of a massive \$500B+ global processing network. You can find out more about what Cybersource does [here](#).
- **Categories:** Sale, Refund, Tokenization, Authorization and Capture.
- **Version:**
- **Compatibility:**

### Contact

Global Partner Solutions – Customer Support: [GlobalPartnerSolutionsCS@visa.com](mailto:GlobalPartnerSolutionsCS@visa.com)

## 2. Package Installation

**Step 1:** Install CPQ and Billing (CPQ first, then Billing) using this link:

<https://install.steelbrick.com/InstallBilling>

**Step 2:** Install the managed package from Salesforce App exchange(<https://appexchange.salesforce.com/>) by searching for “**Cybersource for Salesforce Billing**”.

## 3. Configuration

### Prerequisite

If you are new to Cybersource, and would like to start using Cybersource Cartridge quickly, begin by [signing up for a Sandbox Account](#).

You will also need to create an [API Key and API Shared Secret Key](#) that you can use to authenticate requests to our sandbox server. Follow same steps to generate Production key and shared secret.

Set Field Level Security for Merchant Id, Key ID, Shared Key, Endpoint, Enable Message Level Encryption, REST Certificate, Max Wait Time (Seconds), Level of Data, Token Type fields of **Payment Gateway** (bmg\_\_PaymentGateway\_\_c) object.

### Step 1: Assign Cybersource Permission Set

The package comes with two permission sets

#### 1. Cybersource Admin User

Assign this permission set to Admin user who would be managing the key management of Cybersource managed package. This permission set will provide read and edit access to Merchant Id, Key\_Id(API Name - cybsbilling\_\_Kyid\_value\_\_c), Shared\_Key(API Name - cybsbilling\_\_Sk\_value\_\_c), Endpoint, Enable Message Level Encryption, REST Certificate, Max Wait Time (Seconds), Level of Data, Token\_Type (API Name -

cybsbilling\_\_Tk\_Type\_\_c) fields of **Payment Gateway** (blng\_\_PaymentGateway\_\_c) object.

## 2. Cybersource Billing User

Assign this permission to all the users who would be doing payment processing. This permission set will provide read access to Merchant Id, Key\_Id(API Name - cybsbilling\_\_Kyd\_value\_\_c), Shared\_Key(API Name - cybsbilling\_\_Sk\_value\_\_c), Endpoint, Enable Message Level Encryption, REST Certificate, Max Wait Time(Seconds), Level of Data, Token\_Type (API Name - cybsbilling\_\_Tk\_Type\_\_c) fields of **Payment Gateway** (blng\_\_PaymentGateway\_\_c) object.

### Step 2: Assign Cybersource Payment Gateway Page layout

The package comes with **Cybersource Gateway Layout** of Payment Gateway object (blng\_\_PaymentGateway\_\_c). Assign this layout to user's profile that manages the Cybersource key management.

1. Go to **Setup** by clicking the gear on the right-side top.
2. Click **Object Manager** and go to **Payment Gateway** (blng\_\_PaymentGateway\_\_c) object detail.
3. Click **Page Layouts**.
4. Click **Page Layout Assignment**.
5. Click **Edit Assignment** to assign the **Cybersource Gateway Layout** to appropriate profile.

| SETUP > OBJECT MANAGER      |                                        |                            |
|-----------------------------|----------------------------------------|----------------------------|
| Payment Gateway             |                                        |                            |
| Details                     | Profiles                               | Page Layout                |
| Fields & Relationships      | Customer Community Plus User           | Payment Gateway Layout     |
| Page Layouts                | Customer Community User                | Payment Gateway Layout     |
| Lightning Record Pages      | Customer Portal Manager Custom         | Payment Gateway Layout     |
| Buttons, Links, and Actions | Customer Portal Manager Standard       | Payment Gateway Layout     |
| Compact Layouts             | External Apps Login User               | Payment Gateway Layout     |
| Field Sets                  | External Identity User                 | Payment Gateway Layout     |
| Object Limits               | Force.com - App Subscription User      | Payment Gateway Layout     |
| Record Types                | Force.com - Free User                  | Payment Gateway Layout     |
| Related Lookup Filters      | Gold Partner User                      | Payment Gateway Layout     |
| Search Layouts              | High Volume Customer Portal            | Payment Gateway Layout     |
| List View Button Layout     | High Volume Customer Portal User       | Payment Gateway Layout     |
| Restriction Rules           | Identity User                          | Payment Gateway Layout     |
| Scoping Rules               | Marketing User                         | Payment Gateway Layout     |
|                             | Minimum Access - API Only Integrations | Payment Gateway Layout     |
|                             | Minimum Access - Salesforce            | Payment Gateway Layout     |
|                             | Partner App Subscription User          | Payment Gateway Layout     |
|                             | Partner Community Login User           | Payment Gateway Layout     |
|                             | Partner Community User                 | Payment Gateway Layout     |
|                             | Silver Partner User                    | Payment Gateway Layout     |
|                             | Solution Manager                       | Payment Gateway Layout     |
|                             | Standard Platform User                 | Payment Gateway Layout     |
|                             | Standard User                          | Payment Gateway Layout     |
|                             | System Administrator                   | Cybersource Gateway Layout |
|                             | Work.com Only User                     | Payment Gateway Layout     |

Fig 1: Cybersource Payment Gateway Page Layout

### Step 3: Add new picklist value

1. Go to **Setup** by clicking the gear on the right-side top.
2. Click **Object Manager** and go to **Payment Gateway** (blng\_\_PaymentGateway\_\_c) object detail.
3. Click **Fields and Relationships**.
4. Click **Gateway Type** (blng\_\_GatewayType\_\_c).

5. Click **View Gateway Type Value Set** under **Values** section.
6. Click **New** under **Values**.
7. Enter “**Cybersource Payments**” and click **Save**.

#### Step 4: Create Payment Gateway

1. Click on **App Launcher > Payment Gateways. (bIng\_\_PaymentGateway\_\_c)**
2. Click **New**.
3. Enter the required details

| <b>Fields</b>        | <b>Description</b>                                                                           | <b>Value to Set</b>         |
|----------------------|----------------------------------------------------------------------------------------------|-----------------------------|
| Payment Gateway Name | Enter Payment Gateway name.                                                                  |                             |
| Merchant ID          | Cybersource Merchant ID.                                                                     |                             |
| Gateway Type         | Select the Payment Gateway Type.                                                             | <b>Cybersource Payments</b> |
| Endpoint             | Select Test (Test) or Production (Production)                                                |                             |
| Active               | Select the checkbox.                                                                         |                             |
| Default              | Select the checkbox                                                                          |                             |
| Developer ID         | Unique identifier generated by Cybersource for System Integrator.                            |                             |
| Key_Id               | Cybersource REST KeyId. Follow <a href="#">link</a> for directions.                          |                             |
| Level of Data        | Select the required Level of Data from the picklist. Required only for Credit Card payments. |                             |
| Token_Type           | Select the required Token Type from the picklist.                                            |                             |
| Shared_Key           | Cybersource REST Secret Key                                                                  |                             |

**Table 1: Payment Gateway Settings**

#### NOTE:

- The default value for token type is ‘Payment Instrument ID’. The user can change the value as needed. Token type is a one-time choice and cannot be changed once the first token request has been called.
- Merchants migrating from the Native Salesforce solution to Cybersource will have their Payment token stored as Customer ID tokens.

#### L2/L3 Data Processing

1. The TAA fields in Order layout are required whenever the card type is American Express. It can be added while creating an order by following the steps below.
  - Click on **App Launcher > Orders(Order)**
  - Click **New**.

**TAA Fields**

TAA1 ⓘ

TAA2 ⓘ

TAA3 ⓘ

TAA4 ⓘ

Description

Cancel Save & New Save

**Fig 2: TAA Details Section in Order Page Layout**

- The VAT Registration Number field is added in the Billing Account page layout and User Page Layout which is required by few processors.

Preserve Bundle Structure ⓘ

☒

Default Payment Type

Renewal Model ⓘ

--None--

VAT Registration Number

Additional Information

Type

--None--

Industry

--None--

Employees

Annual Revenue

Cancel Save

**Fig 3: Billing Account Page Layout**

**SETUP**

**Users**

State/Province NY

Zip/Postal Code

Country US

**Single Sign On Information**

Federation ID

**Additional Information**

VAT Registration Number ⓘ

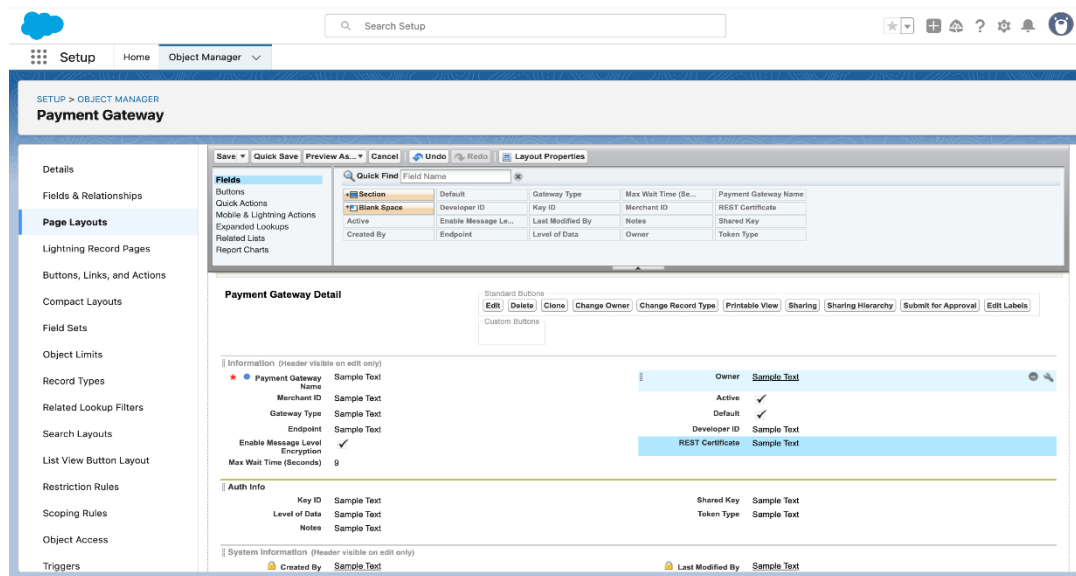
**Fig 4: User Page Layout**

## Step 4.1: Message Level Encryption

Message-Level Encryption (MLE) enables you to store information or communicate with other parties while helping to prevent uninvolved parties from understanding the stored information. MLE is optional and supported only for payments services.

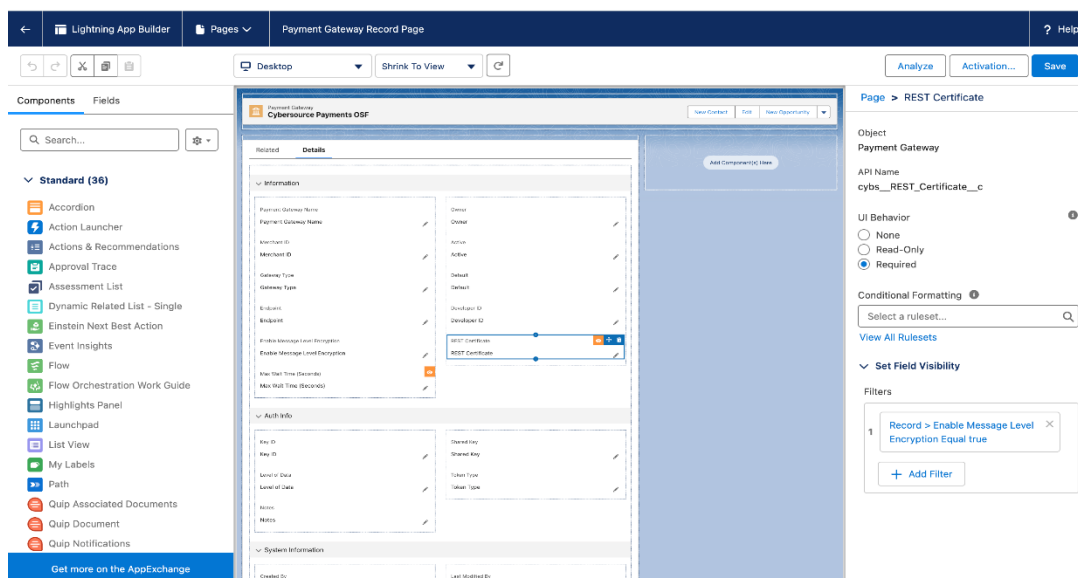
To support Message Level Encryption,

1. Upload the p12 certificate as a Static resource.
  - a. Follow the steps mentioned in this [link](#) to generate a p12 Certificate in the Business Center.
  - b. Note down the password set for the p12 key.
  - c. Download the generated p12 file.
  - d. Convert the p12 file to .pem format in OpenSSL using the below command  
**Command: openssl pkcs12 -in test.p12 -cacerts -nokeys -out cert.pem**  
 In the above command replace <test> with your p12 file name
  - e. Upload the generated p12 in static resource
    - i. Click **Setup**
    - ii. In the quick find box, enter **static resource**
    - iii. Click on **New** button
    - iv. Enter a unique name and upload the above generated file
    - v. Click **Save**
2. Configure the “**blng\_\_PaymentGateway\_\_c**” page layout and verify if all the fields are available in the Payment Gateway Detail.



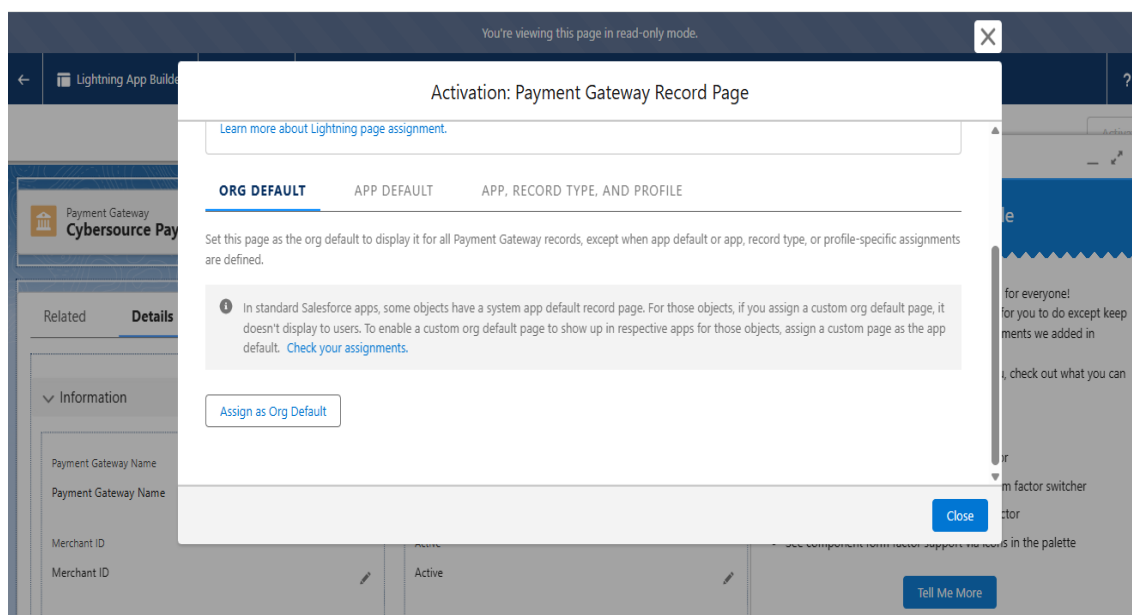
**Fig 5: Payment Gateway Page Layout**

3. Ensure all the fields are available & set the “**REST Certificate**” field property as “**Required**” in the lightning record page.



**Fig 6: Payment Gateway Lightning Record Page**

4. Save the lightning record page.
5. Activate the lightning record and Assign as Org Default



**Fig 7: Payment Gateway Lightning Record Page Activation**

6. Check the **“Enable Message Level Encryption”** checkbox by navigating to the Payment Gateway created in [step 4](#) to support Message Level Encryption, and in the **“REST Certification”** field, enter the name of the static resource created while uploading the p12 certificate.

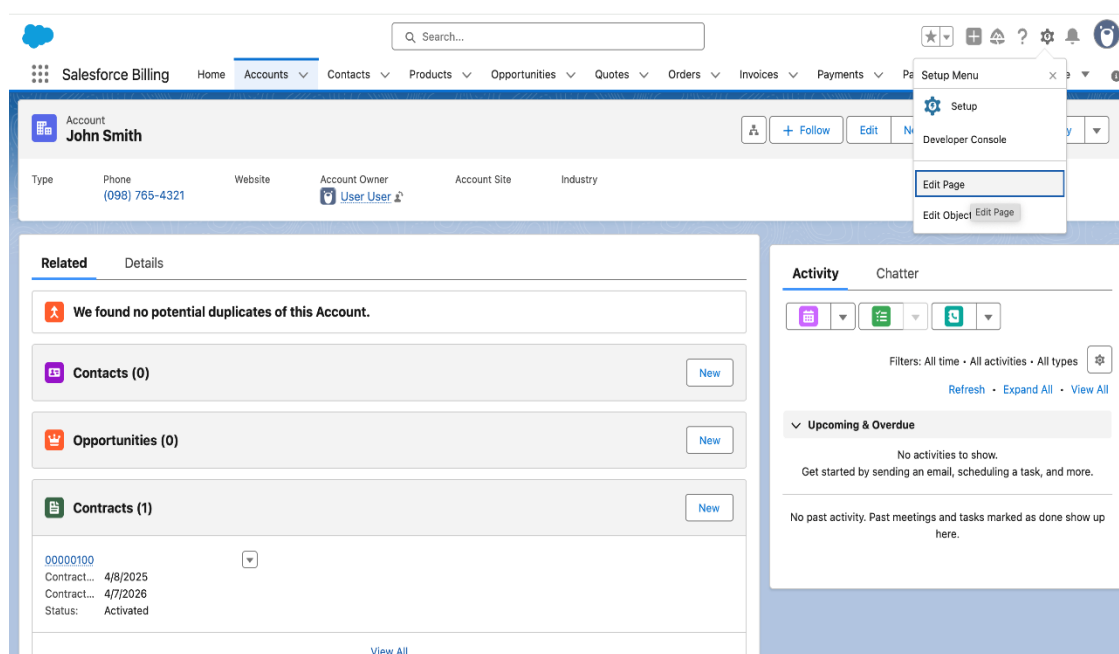
**Max wait time** is the duration needed to encrypt the payload before sending it to Cybersource. If this time limit is exceeded, the transaction will fail, and an error message 'Missing

encrypted payload' is displayed during the payment process. It is recommended to increase the wait time by 1-second increments until the payload is successfully encrypted.

| <b>Fields</b>                   | <b>Description</b>                                                          | <b>Value to Set</b> |
|---------------------------------|-----------------------------------------------------------------------------|---------------------|
| Enable Message Level Encryption | Select the checkbox to enable Message Level Encryption.                     |                     |
| REST Certificate                | Enter the Static resource name created while uploading the p12 Certificate. |                     |
| Max Wait Time (Seconds)         | A default value is 2s, can also be adjusted in case required.               |                     |

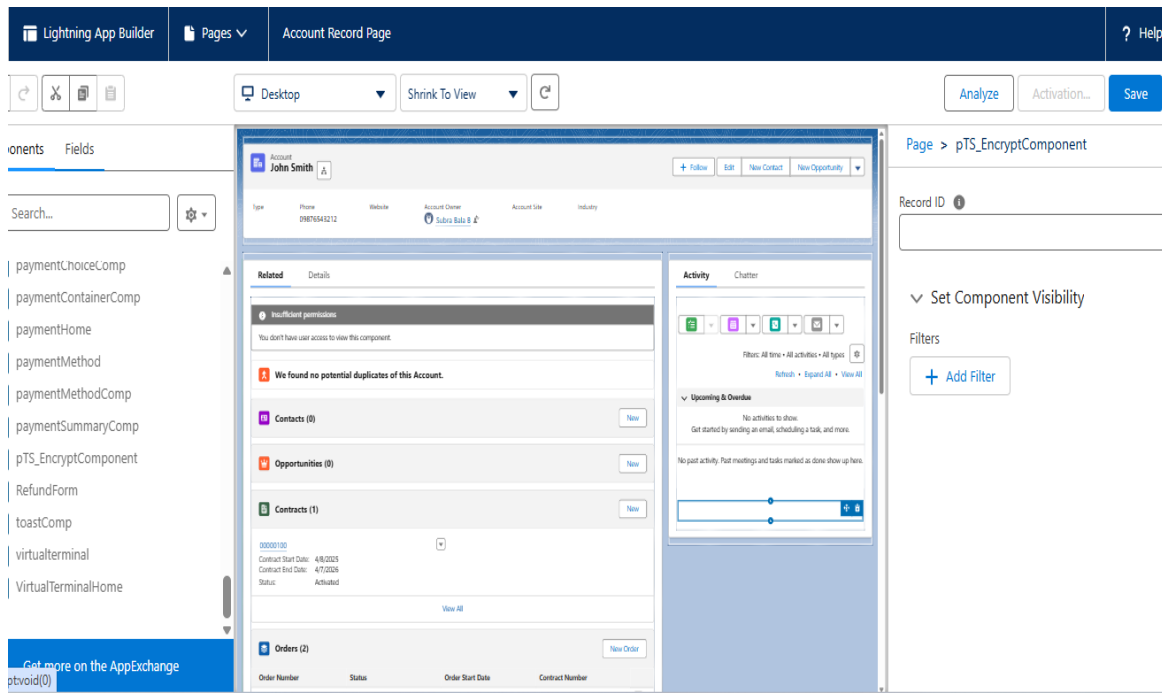
**Table 4.1: Payment Gateway Settings Continued**

7. Go to **Account** -> **open a record** -> Click on **“Edit Page”**



**Fig 8: Account Record Page**

8. Edit the Account object lightning record page, drag the custom Lightning Web component **“PTS\_EncryptComponent”** and drop it inside the Activity tab.



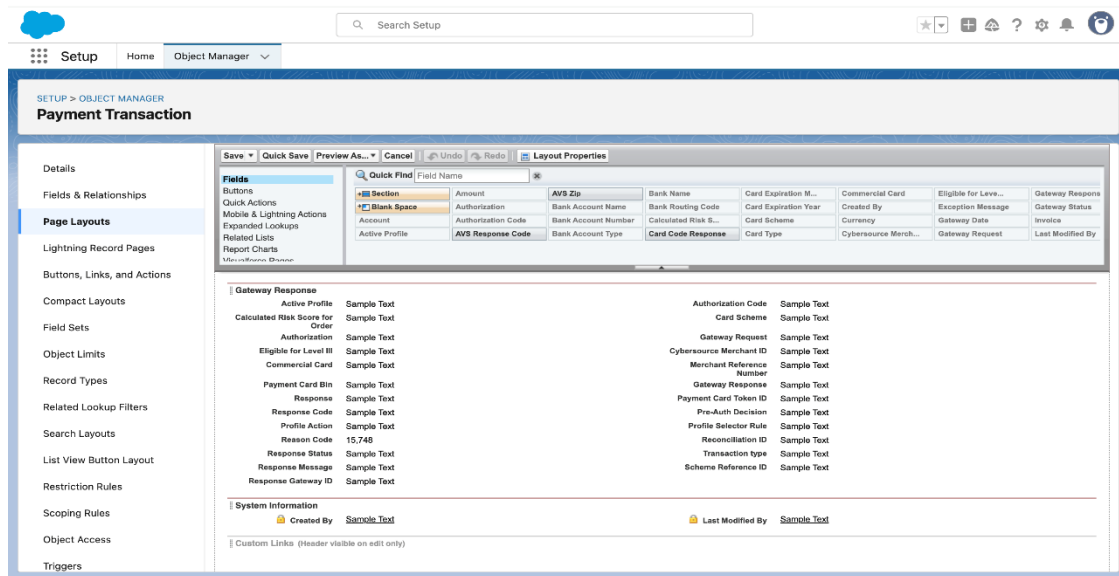
**Fig 9: Account Lightning Record Page**

9. Save the changes and activate the page, Assigning it as Org Default.

### Step 5: Configure Payment Transaction Object Page Layout

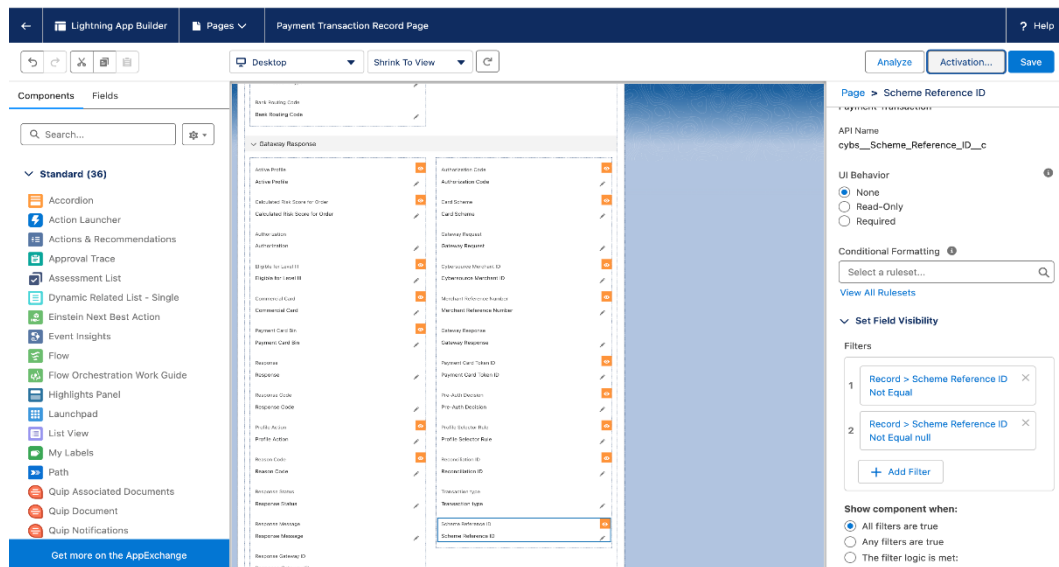
1. The payment transaction page layout must contain the following fields.
  - a. Active Profile
  - b. Authorization Code
  - c. Calculated Risk Score for Order
  - d. Card Scheme
  - e. Commercial Card
  - f. Cybersource Merchant ID
  - g. Eligible for Level III
  - h. Merchant Reference Number
  - i. Payment Card Bin
  - j. Payment Card Token ID
  - k. Pre-Auth Decision
  - l. Profile Action
  - m. Profile Selector Rule
  - n. Reason Code
  - o. Reconciliation ID
  - p. Scheme Reference ID

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**Fig 10: Payment Transaction Page Layout**

2. Ensure that the paymenttransaction object consists of the below lightning record page and is activated.



**Fig 11: Payment Transaction Lightning Record Page**

## 4. Configure the Payment Methods

### 4.1. Payment Card

All payments through the Cybersource cartridge will be processed as a authorize and capture request(sale) in a single message. Therefore, you will not need to capture transactions afterwards. See [Section 5.2](#) if you want to authorize only and capture through another means.

Package supports Visa, Master Card, American Express and Discover cards by default. Create custom metadata type “CardType” records to support other card types. Follow below steps:

1. Goto **Setup**.
2. Search for custom metadata type from quick find.
3. Click on “**Manage Records**” against “**CardType**” metadata type.
4. Click on “**New**” button.
5. Enter following data
  - a. **Label:** <card type>
  - b. **CardType** Name field will be auto-populated.
  - c. **Value:** Look for corresponding value from [link](#).

### 4.2. Electronic Check Processing

Cybersource Billing package supports ACH payment. There are no explicit configurations required to process ACH payments.

## 5. Configure Features (OPTIONAL)

### 5.1. Token Management Service

Refer to this [link](#) to learn about Cybersource’s Token Management service. Cybersource Billing package supports only for Card payments and not for ACH payments.

### 5.2. Authorization Service

All payments through the Cybersource cartridge will be processed as a authorize and capture request (sale) in a single message. If you want to process authorize only, you can make use of this exposed method.

```
Map<String, blng.TransactionResult> obj =  
PTS_BillingPaymentAdapter.processPayments(blng.TransactionParameter>  
mapOfTransactionParameterById, blng.PaymentGatewayParameter  
paymentGatewayParameter);
```

TransactionType of blng.PaymentGatewayParameter should be “**authorizeTransaction**” to process authorization service. Refer to this [link](#) to learn about blng.TransactionParameter class.

### 5.3. Capture Service

All payments through the Cybersource cartridge will be processed as a authorize and capture request (sale) in a single message. If you have used the Authorization Service method to only authorize payments, you can make use of this exposed method for capturing the authorization.

```
Map<String, blng.TransactionResult> obj =  
PTS_BillingPaymentAdapter.processPayments(blng.TransactionParameter>  
mapOfTransactionParameterById, blng.PaymentGatewayParameter  
paymentGatewayParameter);
```

TransactionType of blng.PaymentGatewayParameter should be “**captureTransaction**” to process authorization service. Refer [url](#) to know more about blng.TransactionParameter class.

### 5.4. Refund Service

Cybersource Billing package supports Credit Card refunds electronic refunds. Refer to this [link](#) to know how salesforce Billing processes Refund.

## 6. Test and Go Live

Before you start accepting payments, test your integration in Test sandbox:

The sandbox simulates the live payment gateway. The sandbox never processes an actual payment. We do not submit sandbox transactions to financial institutions for processing. The sandbox environment is separate from the live production environment, and it requires separate credentials. If you use your production credentials in the sandbox or vice versa, you get a 401 HTTP error.

Test your integration, and configure your live account, so you can start processing live transactions.

### Ready to Go Live

1. Install the managed packaged in Production Org.
2. Assign Cybersource Permission set in Production Org by following Step [link](#).
3. Assign Cybersource Payment Gateway page layout in Production Org by following steps in [link](#).
4. Add a new picklist value “**Cybersource Payments**” to “**Gateway Type**” field of “**Payment Gateway**” object by following steps in [link](#). Make sure picklist value is “**Cybersource Payments**”.
5. Create a new Payment Gateway record in your Production Org by following steps in [link](#). Make sure Endpoint is selected “Production”.

### Troubleshoot:

**Issue:** Script-thrown exception (System Code) - No implementation registered for service interface Cybersource Payments.

## Solution:

1. Navigate to Setup → Custom Settings → Payment Gateway Config → Manage.
2. Click Cybersource Payments. Edit Gateway Class Name if an incorrect cybsbillinbilling namespace is identified.
3. Update or remove the additional billing text and save the record.



**Fig 12: Payment Gateway Configuration Detail**

## 7. Upgrade Package

Follow the standard Salesforce process to upgrade the “Cybersource for Salesforce Billing” package. Please refer to this [link](#) for more details.

## 8. Release Notes

### Version 1.6.0 (May 2026)

- Supports Payments using Payment Schedulers
- Fixed a SOQL query issue related to BillingCompany field retrieval

### Version 1.5.0 (April 2025)

- Added Message Level Encryption Support

### Version 1.4.0 (October 2024)

- L2/L3 Data Processing
- Token type support for Tokenization

### Version 1.3.0 (June 2024)

- HTTP header updates
- Amex card bug fix

### Version 1.0.0 (July 19, 2021)

- Add Sale & Refund services for Card Payment method.
- Added API services for Authorization & Capture.
- Supports Card tokenization.
- Added Refund service for PayPal payment method.

- Supports eCheck payment method.