



Salesforce Payments Managed Package for Order Management

INSTALLATION & SETUP GUIDE

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Salesforce Payments is now native on the Salesforce Platform. For B2B Commerce, D2C Commerce, and Salesforce Order Management products that don't require PayPal support, use the native integration. Learn how to use the native integration from [Salesforce Payments](#).

This managed package is only for use with Stripe, PayPal, and Venmo for customers requiring the use of PayPal for issuing refunds in Salesforce Order Management.

Salesforce Payments managed package helps launch digital commerce sites faster and integrates with Salesforce Order Management for payment processing..

This package is for use for a limited use case:

Product	Package Required?
B2C Commerce + Salesforce Order Management + Payments + Paypal + Venmo	Required. Install the package on the same org as Order Management. Order Management can capture payments and issue refunds for Salesforce Payments-associated Stripe accounts. For Salesforce Payments-associated PayPal accounts, Order Management can only issue refunds.
B2B or D2C Commerce + Payments	Not required
B2C Commerce Only	Not required
B2C Commerce + Salesforce Order Management + Payments (Credit Cards only)	Not required

The package installs a Salesforce Payments Setup app. With the setup app, you associate Payments merchant accounts to Stripe and PayPal. This linking enables Salesforce Payments.

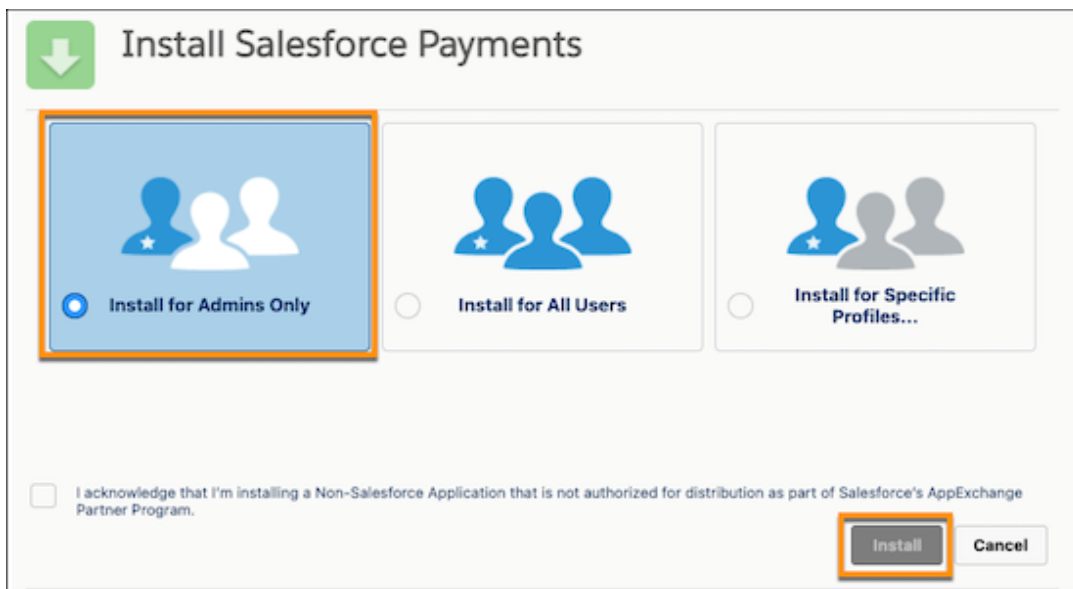
To use Salesforce Payments with B2C Commerce and Order Management, see these resources:

- [Salesforce B2C Commerce](#) for information about using Salesforce Payments.
- [Salesforce Order Management Implementation Guide for B2C Commerce](#)

Install the Salesforce Payments Package

You can install the Payments package on a Salesforce org with Order Management. To install the package, you'll need a Salesforce Account.

1. Navigate to the [package on AppExchange](#).
2. On the listing page, click **Get It Now**. If you don't have a Salesforce account, create one.
3. Select whether to install the package in a production or sandbox environment. Provide any required information. For sandbox environments, the package is removed when you create a sandbox copy.
4. If the package is password-protected, enter the password you received from Salesforce.
5. Review the package items and continue.
6. When prompted, select which users can control access permissions. We recommend selecting **Install for Admins Only** then click **Install**.



Install Salesforce Payments

☒ Install for Admins Only ☐ Install for All Users ☐ Install for Specific Profiles...

☐ I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

Install Cancel

7. On the Approve Third-Party Access page, grant access to the third-party, and click **Continue**.

Approve Third-Party Access

This package may send or receive data from third-party websites. Make sure you trust these websites. [What if you are unsure?](#)

Website	SSL Encrypted
api-m.paypal.com	☒
api-m.sandbox.paypal.com	☒
api.stripe.com	☒

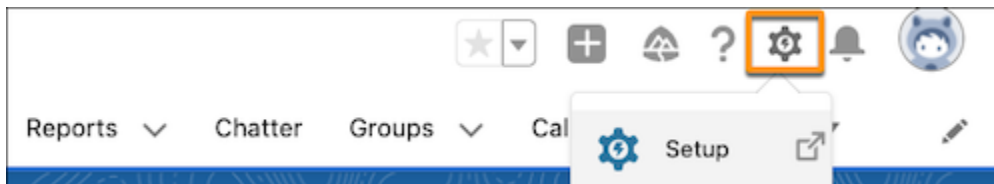
☒ Yes, grant access to these third-party web sites

8. Click **OK**.

Assign Permissions to Use Salesforce Payments

Assign the necessary permissions set to your admins or standard users.

1. Access the **Setup** menu from the gear icon.



2. From Setup, in the Quick Find box, enter `Permission Sets`.
3. Select the permission set you want to assign.
4. Click **Manage Assignments**.
5. Select **Add Assignments** and select the checkbox next to the users that require permissions.
6. Select **Assign**.
7. When you're finished, exit setup.

Link an Existing Merchant Account to a Payment Provider Account

Associate an existing Payments Merchant account to a Stripe or PayPal provider account.

Existing B2C Commerce merchant accounts are already linked to storefronts using Business Manager. For more information, see the [Salesforce B2C Commerce Guide](#).

Important! To connect to an existing Salesforce Payments Stripe account, it must be a previously created Payments merchant account, not a standard Stripe account purchased from Stripe.

1. From the org where the Payments package is installed, go to the App Launcher and select **Salesforce Payments Setup**.
2. Click **Add Account**.
3. Choose whether you're associating a Stripe or PayPal account.
4. In the Guidance panel, enter your Stripe Account ID or PayPal Merchant ID and click **Authorize**. To find your Account ID, hover over the information icon.

Tip! Enter only the ID number without any prefix.

For Stripe, you're directed to a Stripe dashboard to verify a test payment of US\$20.

5. Confirm the payment then click **Capture**. After a successful capture, you're redirected to the Created Accounts page. There is no test payment for PayPal.
6. Click **Verify**.

Repeat these steps for Stripe and Paypal as needed to complete the Salesforce Payments merchant account setup.