

DC Payments App

Version: 1.0

Installation and Setup Guide (Razorpay)

September 2022

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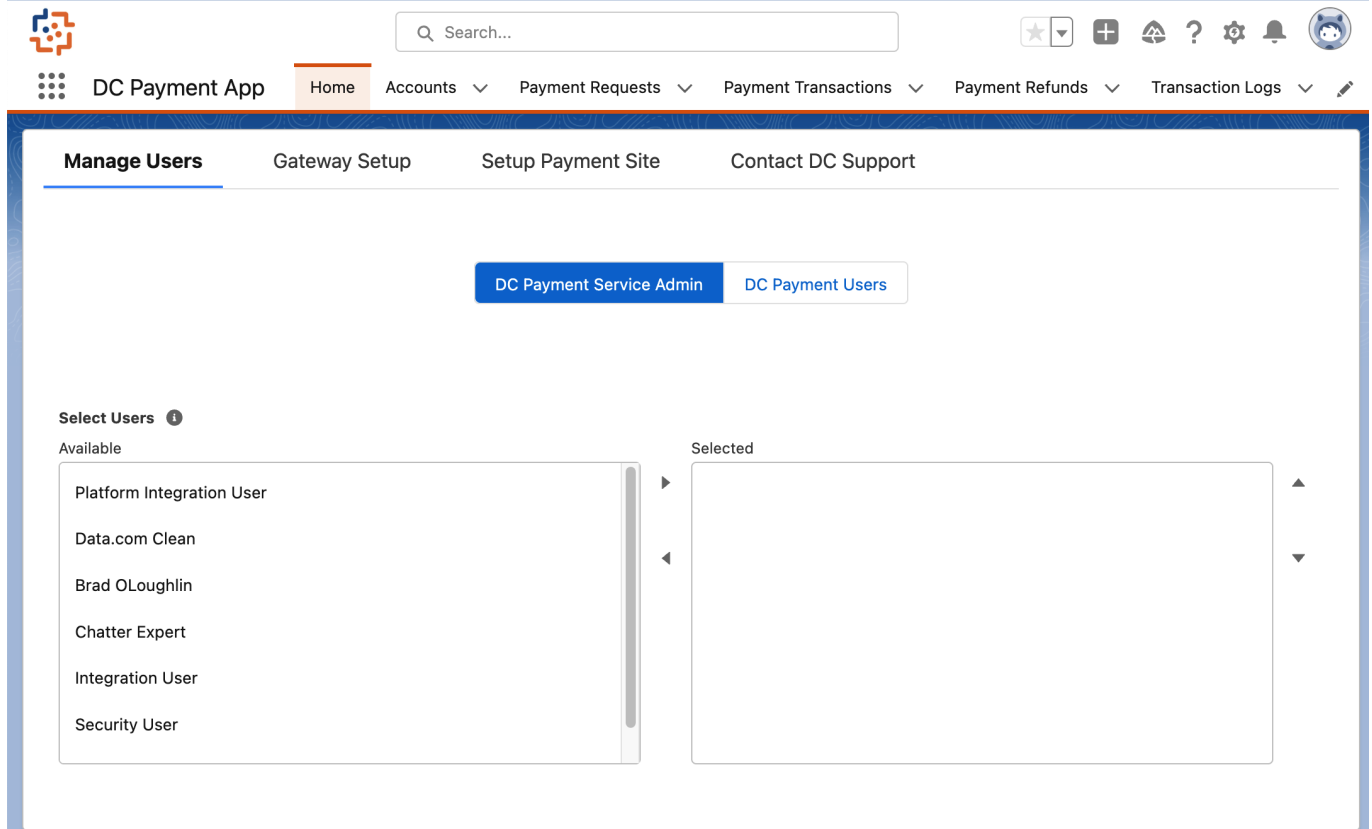
About the Payments App

The DataColada Payments App is a Salesforce Connector to a number of Payment Gateway providers which allows you to create payment request links for your customer from the Opportunity record in Salesforce.

Currently, our package supports:

1. Stripe
2. Razorpay
3. PayTM
4. PayPal (pending release)

The DataColada Payment App, includes Gateway Setup tabs to guide you through the configuration process.



After the setup has been completed, you can insert the Payment App Component onto the Opportunity Page layout along with the Custom fields for the Payment Links

Pre-Requirements

Salesforce Account

- A Salesforce instance with a Registered My Domain
- (x1) Site.com license

Payment Gateway Account

Razorpay Account

An Active Razorpay Account with the following features:

- Payment Link
- Payment Checkout
- Payment Refund

To set up a Razorpay Account: <https://razorpay.com/>

Name:	
Email:	
Password:	
BSB:	
ACC:	
Backup Code:	
Country:	
Currency:	
TEST MODE	
Secret Key:	

1. Activate Payments

Razorpay Resources:

<https://razorpay.com/docs/api/>

<https://razorpay.com/docs/api/best-practices/>

<https://razorpay.com/docs/api/errors/list>

Payment App Installation Process

Installation Process

Target Org Credentials

Username:	brad.oloughlin+razorpay@datacolada.com
Email:	brad.oloughlin+razorpay@datacolada.com
Password:	PaymentApp22!!
URL:	www.login.salesforce.com
My Domain:	
Site URL:	

Alternate User:

Username:	isvorgnfp+razorpay@datacolada.com
Email:	isvorgnfp+razorpay@datacolada.com
Password:	PaymentApp22!!

Package Location:

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t5i0000000QcVT>

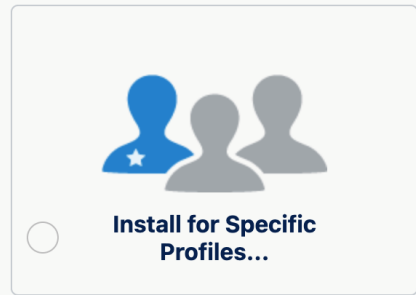
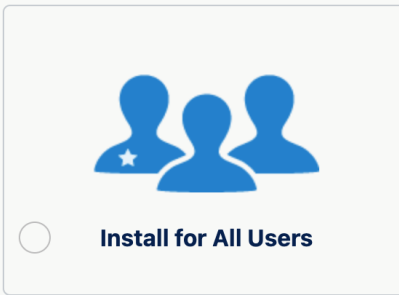
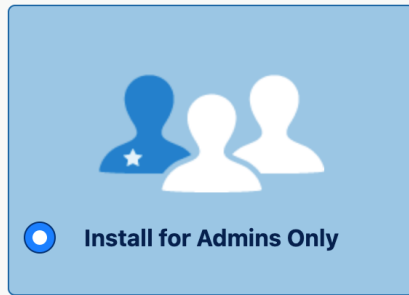
Package Installation

1. In a new Browser, paste the DC Payments App Package Installation link
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t5i0000000QcVT>
2. Log in with the Salesforce Org Credentials (System Admin or API User)
3. Install for Admins Only



Install DC Payment App

By DC Payments - DataColada Pty Ltd



You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program. ⓘ



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

App Name	Publisher	Version Name	Version Number
DC Payment App	DC Payments - DataColada Pty Ltd	DC Payment App	1.0

Additional Details [View Components](#)

NOTE: The DataColada Payment App is currently under review for the Salesforce AppExchange

4. Approve 3rd Party Access

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.razorpay.com	☒
api.stripe.com	☒
securegw-stage.paytm.in	☒
securegw.paytm.in	☒

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

Continue **Cancel**

- An email will be sent via salesforce with the status (Success/Fail) of the Installation
- Verify the installation is complete, via Installed Packages: DC Payment App

Installed Packages

[Help for this Page](#)

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages.](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.



Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall	 DC Payment App	DC Payments - DataColada Pty Ltd	1.0	dcpay	2/9/2022, 11:36 am	✓	1	4	6	Not Passed

Post Installation Steps

Create a new Call Back Site (Public)

If you this is your 1st Salesforce Site, you may be required to **Register a Salesforce Site Domain**

Sites

Help for this Page ?

What is a Site?

Salesforce sites enables you to create public websites and applications that are directly integrated with your Salesforce.com organization—without requiring users to log in with a username and password. You can publicly expose any information stored in your organization through pages that match the look and feel of your company's brand. Use sites to create public community sites to gather customer feedback, branded login and registration pages for your portals, Web forms for capturing leads, and so on.

Because sites are hosted on Salesforce servers, there are no data integration issues. And because sites are built on native Visualforce pages, data validation on collected information is performed automatically. You can allow users to access your site through your unique Salesforce domain and URL, or you can register your own branded domain or subdomain to redirect to your site.

Create multiple sites that appeal to different audiences and satisfy your company's various business needs. For example, a software company could create one site for new developers, another for customers, and a third for marketing.

Sample Domain Name

razorpay22-dev-ed.my.salesforce-sites.com

Sample sites URLs

razorpay22-dev-ed.my.salesforce-sites.com/customers

razorpay22-dev-ed.my.salesforce-sites.com/developers

razorpay22-dev-ed.my.salesforce-sites.com/partners

http://razorpay22-dev-ed.my.salesforce-sites.com

☒ I have read and accepted the Salesforce [Sites Terms of Use](#)

Register My Salesforce Site Domain

2. Click on the check box for I have read and accepted the Salesforce Terms of Use.
3. If available, click on the **Register My Salesforce Site Domain**
4. Your new Salesforce Sub Domain is ready for your new Sites

Create a New Site for the Payment App

1. In Salesforce Setup, search and select **Sites**
2. At the bottom of the Sites Setup page, click on the **New** button

Sites (razorpay22-dev-ed.my.salesforce-sites.com) New

Site Label ↑	Site URL	Site Description	Active	Site Type	Last Modified By
No records to display.					

3. Enter in the Require Fields (highlighted in red)
4. For the **Active Site Home Page field**, use the search tool to search and select the **RedirectToPaymentScreen** (VisualForce page)

NOTE: If you have multiple existing Sites, we recommend adding a path (Ie: Pay) to the **Default Web Address**

Site Edit Help for this Page ?

Payment App

Site Edit Save Cancel

Site Label Payment App i

Site Name Payment_App i

Site Description Dedicated site for the DataColada Payment App

Site Contact brad OLoughlin i

Default Record Owner brad OLoughlin i

Default Web Address http://razorpay22-dev-ed.my.salesforce-sites.com/ Pay i

Active ☒ i

Active Site Home Page redirectToPaymentScreen i [Preview]

Inactive Site Home Page InMaintenance i [Preview]

Site Template SiteTemplate i

5. Click **Save**
6. Verify the **Site is Active**

Sites (razorpay22-dev-ed.my.salesforce-sites.com) New

Action	Site Label ↑	Site URL	Site Description	Active	Site Type	Last Modified By
Edit Deactivate	Payment App	https://razorpay22-dev-ed.my.salesforce-sites.c...	Dedicated site for the DataColada Payment App	☒	Force.com	brad OLoughlin, 6/9/2022, 2:41 pm

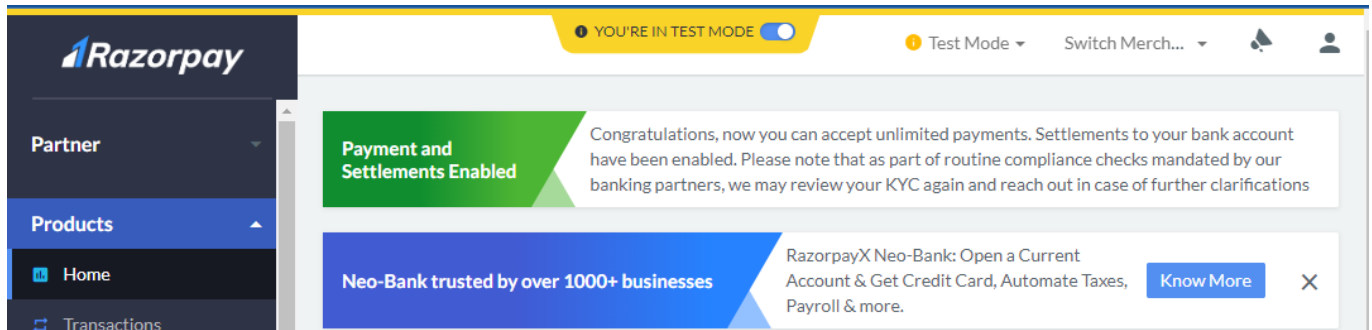
Payment Service Provider Configuration

RAZORPAY

To locate the API Credentials for your Razorpay Payment Gateway Account

1. Log into your Razorpay account: <https://dashboard.Razorpay.com/login> and enter your credentials:
If you have multiple Razorpay Accounts, select the **Account** set up for this connection

NOTE: Ensure the Razorpay Account is set to Test Mode for initial Setup



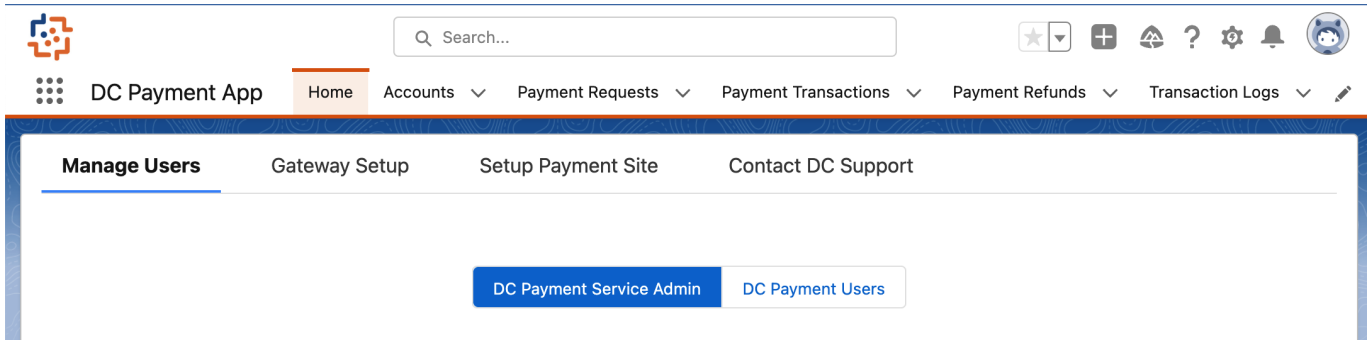
2. In the Admin panel on the left, click on the **My Account** (link)
3. To reveal the **Secret Key** for the **DC Payments App>Merchant Key**, click on the eye icon over the hashed out field, then click on the Secret Key (click to Copy)

The Secret Key should look similar to this: (not the same as this is for our test account)

Salesforce Gateway Setup

NOTE: These steps will need to be repeated when switching from Test Mode in Razorpay to Live Mode.

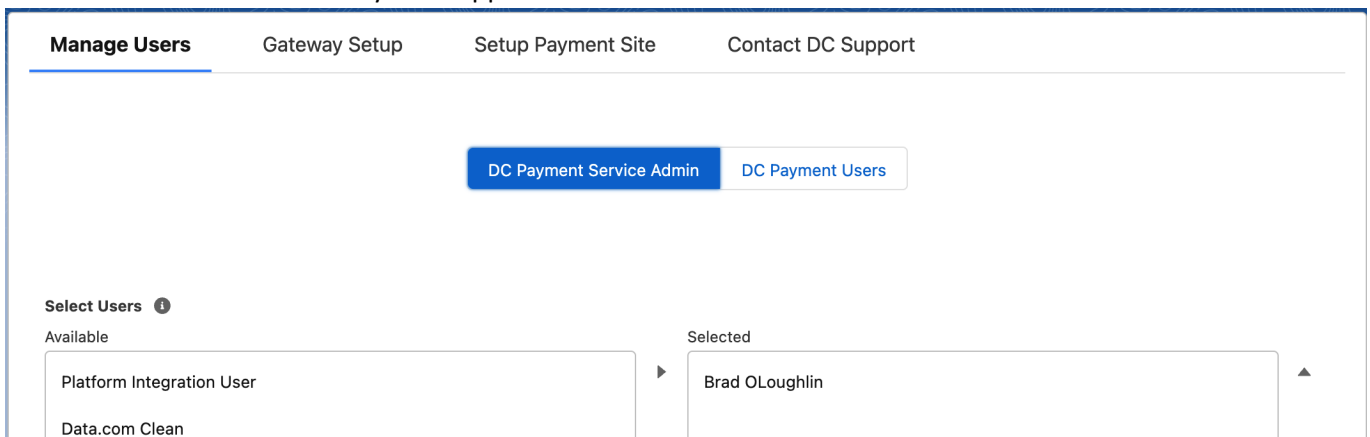
1. Login to the Salesforce Org
2. Click on the **AppLauncher** and select the **DC Payment App**



Manage Users tab

On this tab, we will assign Permissions to the Administrators and the Users

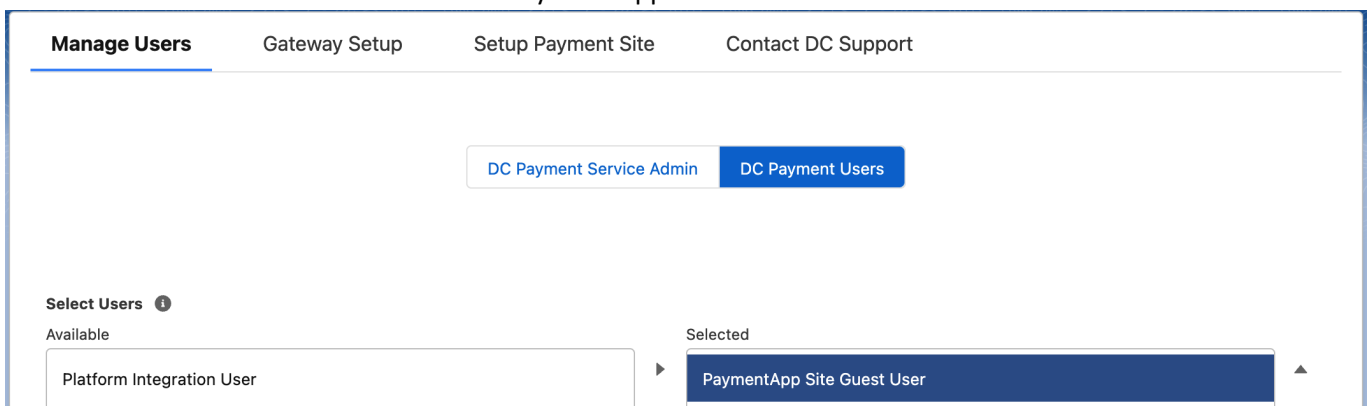
1. On the **Manage Users** Tab, click on the **DC Payment Service Admin** button
2. From the **Available** list (of Users), select the User(s) who will be assigned a Set of Permission to Administrate the DC Payment App.



1. On the **Manage Users** Tab, click on the **DC Payment Users** button
2. From the **Available** list (of Users), select the **Guest User for the Site** to allow the DC Payment App to render on a Public Site.

In our example our Site Name is: Payment App

And the Guest User for the Site is: Payment App Guest User



A custom Sharing rule will also need to be created

1. In Salesforce Setup, search and select **Sharing Settings**
2. From the **Manage Sharing setting for:** drop down, select the **Payment Request** Object
3. In the **Sharing Rules** section, click on the **New** button

Sharing Rules

Payment Request Sharing Rules [New](#) [Recalculate](#) [Payment Request Sharing Rules Help ?](#)

No sharing rules specified.

4. Fill in the fields similar to the image below

Setup Home Object Manager

Q sharing

Security

Sharing Settings

Didn't find what you're looking for? Try using Global Search.

SETUP Sharing Settings

Setup [Help for this Page ?](#)

Payment Request Sharing Rule

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role.

You can use sharing rules only to grant wider access to data, not to restrict access.

Step 1: Rule Name ! = Required Information

Label

Rule Name [i](#)

Description

Step 2: Select your rule type

Rule Type ☐ Based on record owner ☐ Based on criteria ☒ Guest user access, based on criteria

Step 3: Select which records to be shared

 This sharing rule grants access to guest users without login credentials. By modifying the default settings in accordance with these criteria, you're allowing immediate and unlimited access to all records matching these criteria to anyone accessing the site, even without logging in. To secure your site and its data from guest users, consider all the use cases and implications, and implement security controls that you think are appropriate for the sensitivity of your data. Salesforce isn't responsible for any exposure of your data to guest users related to this change from default settings.

Criteria	Field	Operator	Value	
	Created By ID	equals		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		

[Add Filter Logic...](#)

Additional Options ☐ Include records owned by high-volume users [i](#)

Step 4: Select the users to share with

Share with

Step 5: Select the level of access for the users

Access Level

[Save](#) [Cancel](#)

5. Click on **Save**

NOTE: Securing the ID for your Site Guest User is tricky in Lightning, we recommend switching to lightning for this step.

Securing the ID for your Site Guest User

1. In Classic Mode, go to **Setup** search and select **Sites**
2. Click on the Site used for the DataColada Payment App
In our case it's the Payment App
3. Click on the **Public Access Settings** button
4. Click on the **View Users** Button
5. Click on the Full Name of the Guest User

Payment App Profile

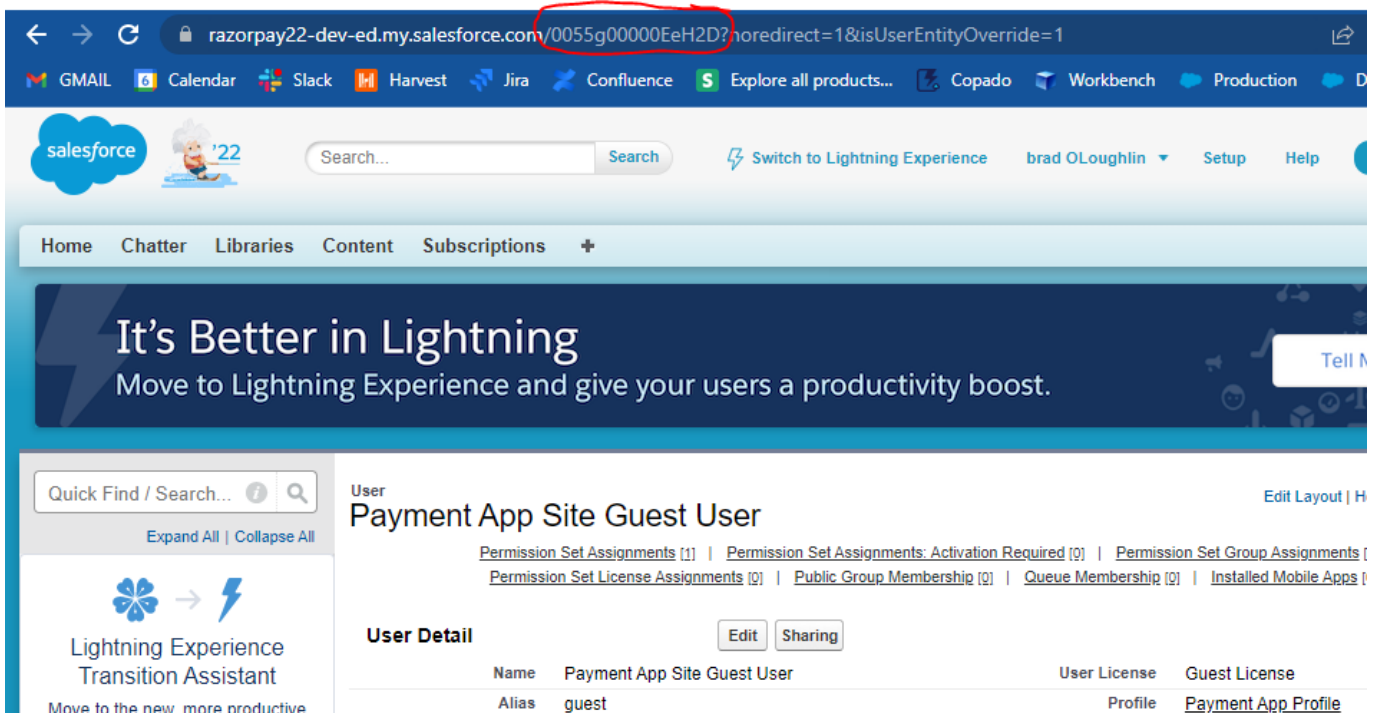
[Help for this Page](#) ?

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All						
Action	Full Name ↑	Alias	Username	Role	Active	Profile
Edit	Site Guest User, Payment App	guest	payment_app@00d5g00000fmkhoea3.org.force.com		✓	Payment App Profile

6. Copy the Guest User ID (try double clicking on the Id number after your Salesforce Org domain.)
7. The Guest User ID in our example is: 0055g00000EeH2D

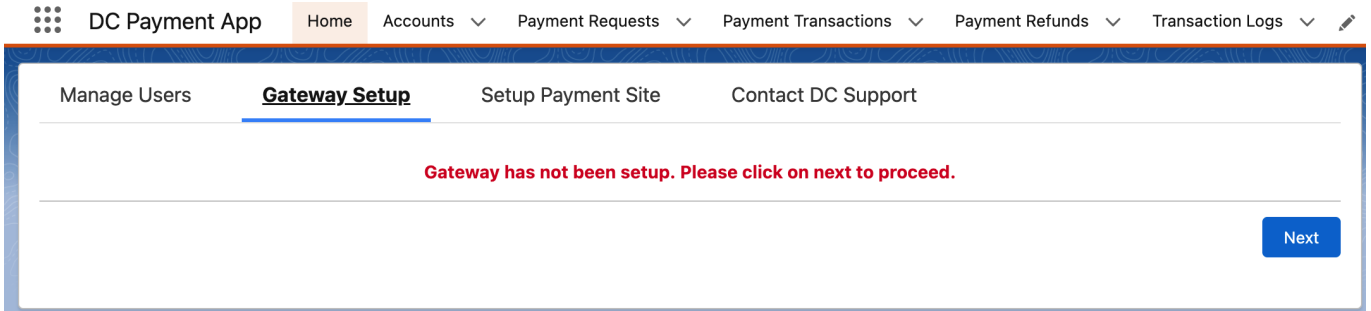


The screenshot shows the Salesforce Lightning Experience interface. The browser address bar displays the URL: `razorpay22-dev-ed.my.salesforce.com/0055g00000EeH2D?noRedirect=1&isUserEntityOverride=1`. The user profile page for 'Payment App Site Guest User' is visible, showing details such as Name, Alias, User License, and Guest License. The user is active and has a profile assigned.

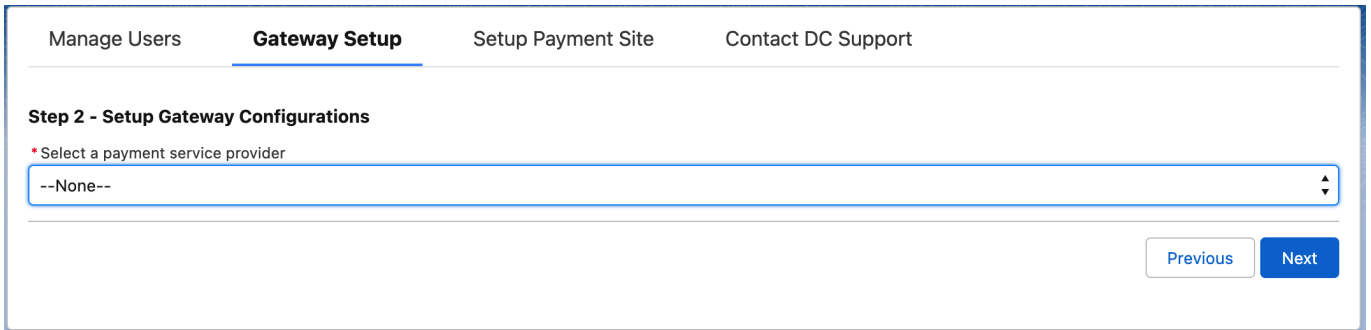
Gateway Setup

NOTE: Before starting this process, please contact DataColada to obtain a Sub-Merchant Account Id at: hello@datacolada.com or complete the form at:

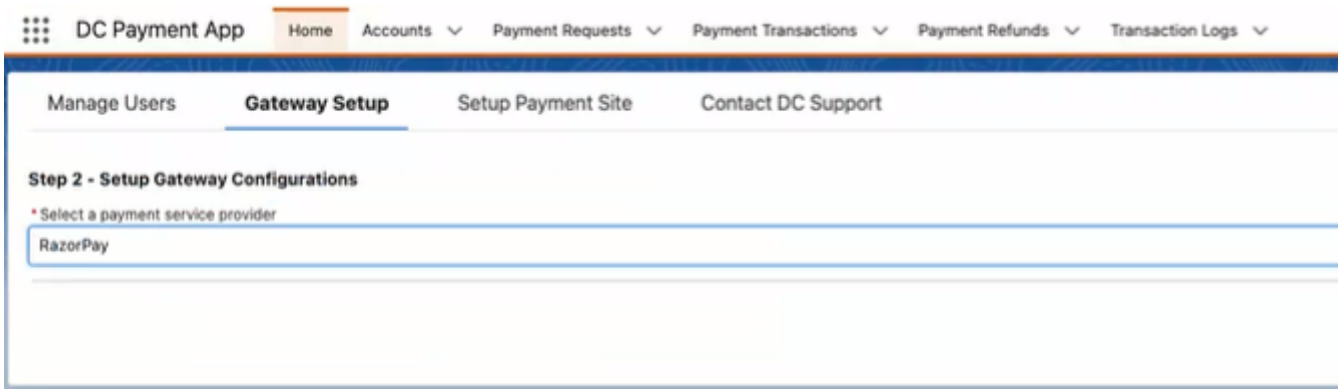
1. Click on the Gateway Setup Tab and click on the **Next** button



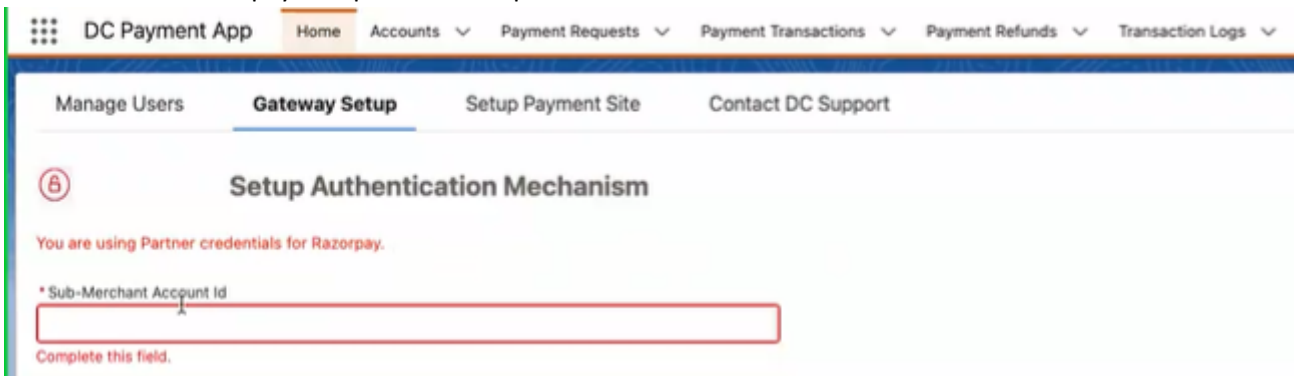
2. From the drop down, select a Payment Service Provider



3. In this example, we will be setting up a Razorpay account, so we will select **Razorpay** and then click on **Next (NEW SCREENSHOT)**

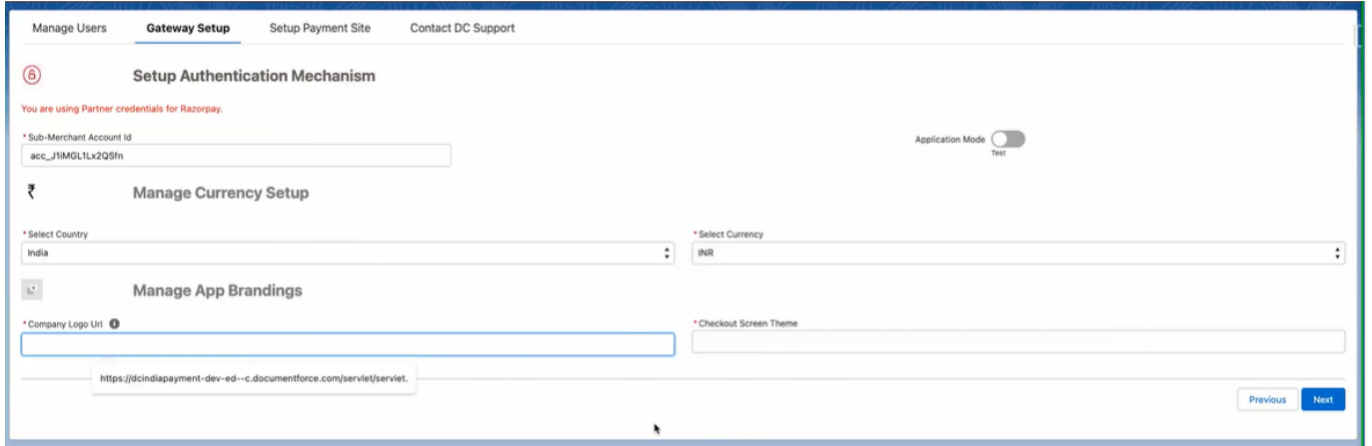


4. On the Razorpay Setup Screen complete the fields



5. Enter in the Following:

Sub-Merchant Account ID	Provided by DataColada (Razorpay Partner Account ID)
Base Endpoint URL	https://api.Razorpay.com/v1/
Merchant Key	<Should be obtained from the Razorpay Account>Secret Key
Country	<Select country from the dropdown>
Currency	<Select Currency from the dropdown specific to the country>



And for the Country & Currency, select from the drop down list.

Company Logo URL:

The image must be on a URL

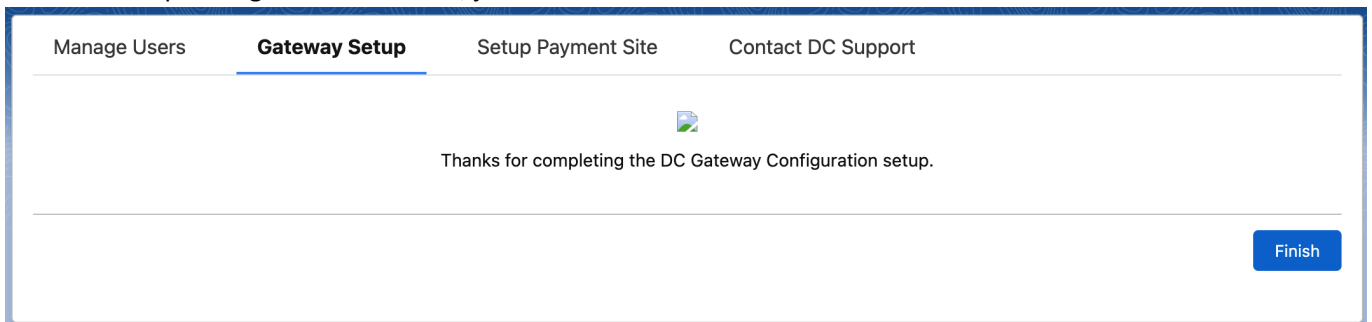
Check out Screen Theme:

Enter the colour code

And for the Country & Currency, select from the drop down list.

NOTE: If your Country &/or Currency don't exist on the list, please follow the steps below to add the options to the fields

6. After pressing the **Next** button, just click on the **Finish** Button



If you need to set up a new Country/Currency

1. In Setup, go to **Custom MetaData Types** and select **DC Manage Currency**

[Custom Code](#)

[Custom Metadata Types](#)

Didn't find what you're looking for?
Try using Global Search.

SETUP

Custom Metadata Types

All Custom Metadata Types

Custom metadata types enable you to create your own setup objects whose environment to another, or packaged and installed.

Rather than building apps from data records in custom objects or custom settings, you can create custom metadata types that you can deploy, and upgrade. Querying custom metadata records doesn't count against your org's metadata API limits.

[New Custom Metadata Type](#)

Action	Label	Namespace Prefix
Del Manage Records	DC General Setting	
Del Manage Records	DC Manage Currency	

- In **Custom Field** section, click on the **Country** (Field Label)

Custom Fields New					
Action	Field Label	API Name	Data Type	Field Manageability	Index
Edit Del	Country	Country__c	Picklist	Upgradable	
Edit Del	Country Code	Country_Code__c	Text(10)	Upgradable	
Edit Del	Currency	Currency__c	Picklist	Upgradable	

- Down the page in the **Values** section click on the **New** button to add the Country

Values New				
Action	Values	API Name	Default	Chart Colors
Edit	India	India	☒	Assigned dynamically

- And click **Save**

Values New Reorder Replace Printable View Chart Colors				
Action	Values	API Name	Default	Chart Colors
Edit Del Deactivate	India	India	☒	Assigned dynamically
Edit Del Deactivate	Australia	Australia	☐	Assigned dynamically

- Use the **Activate/Deactivate** action for Currencies/Countries

Values New				
Action	Values	API Name	Default	Chart Colors
Edit	Australia	Australia	☐	Assigned dynamically

Inactive Values Delete Unused Values ^{Beta!}			
Action	Values	API Name	Modified By
Del Activate	India	India	Brad O'Loughlin , 8/7/2022, 4:39 pm

6. Click on the **Manage DC Manage Currencies** button


SETUP

Custom Metadata Types

Custom Metadata Type

DC Manage Currency

[Standard Fields \[0\]](#) |
 [Custom Fields \[3\]](#) |
 [Validation Rules \[0\]](#) |
 [Page Layouts \[1\]](#)

Custom Metadata Type Detail

[Edit](#)
[Delete](#)
[Manage DC Manage Currencies](#)

Singular Label	DC Manage Currency	Description
Plural Label	DC Manage Currencies	Visibility
Object Name	DC_Manage_Currency	Protection Level
API Name	DC_Manage_Currency__mdt	Record Size
Created By	Brad O'Loughlin , 8/7/2022, 1:36 pm	Modified By

7. Click on the **New** button


SETUP

Custom Metadata Types

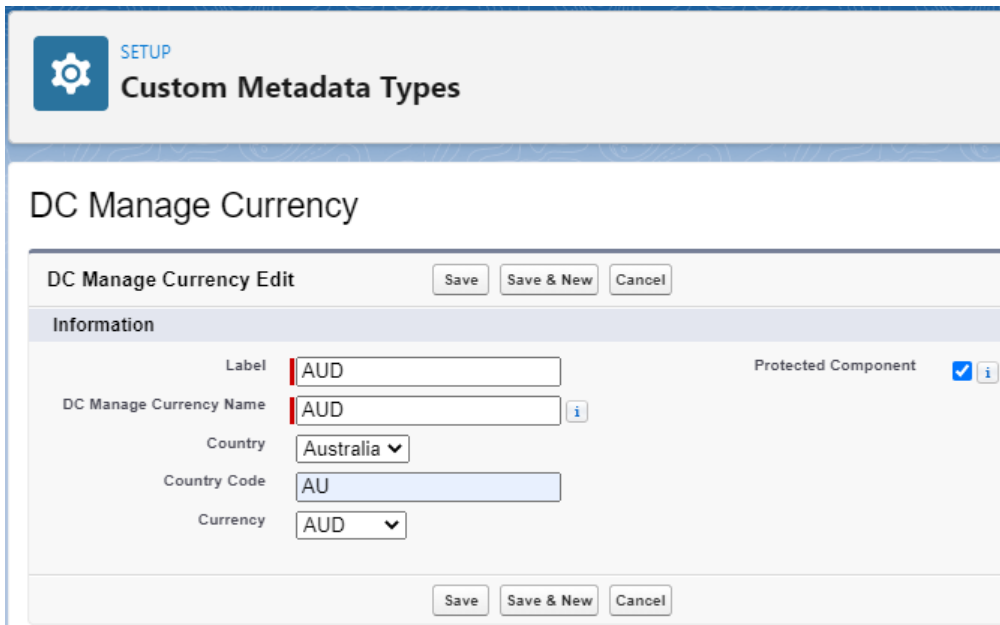
DC Manage Currencies

View: All ▼ [Create New View](#)

[New](#)

Action	Label ↑	DC Manage Currency Name
Edit Del	X1	X1

8. Set the **Currency & Country** for the Salesforce Org (Currently AUD)



NOTE: CURRENCY TYPES MUST MATCH

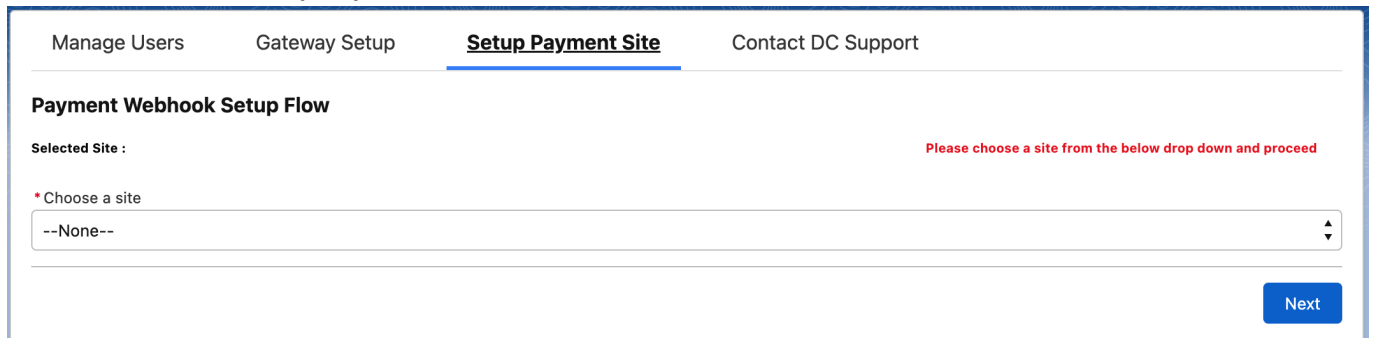
9. Return to the **Gateway Setup** Page and refresh the browser to accept values
10. Now you can select the newly created values (Country & Currency)
11. Click **Next** to save changes and Finish to complete the Gateway Setup

The **Gateway Setup** has been Successfully completed

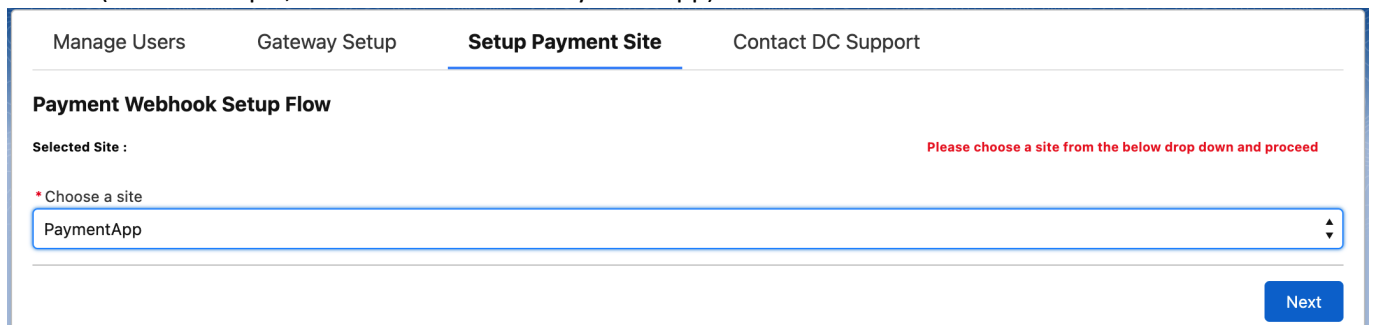
Setup Payment Site

Once the gateway setup is finished, let's move to configure the payment site for the gateway.

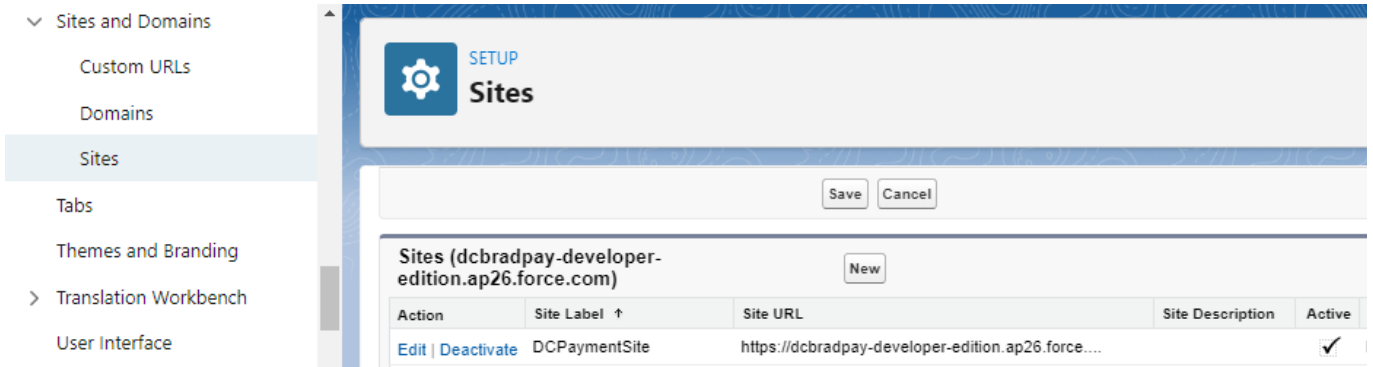
1. Click on the **Setup Payment Site** tab.



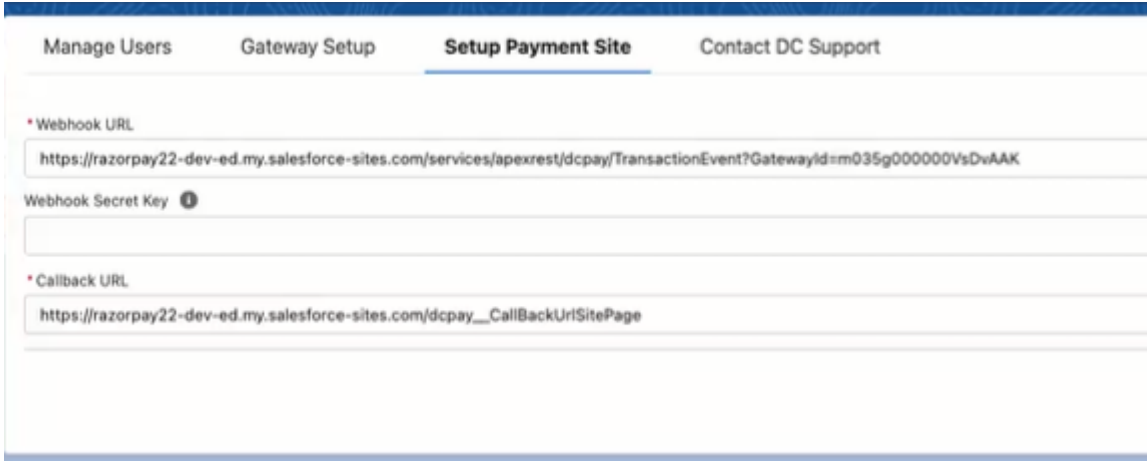
2. Select the Salesforce **Site** which had been created earlier and click on **Next**.
(in our example, our Site was named: Payment App)



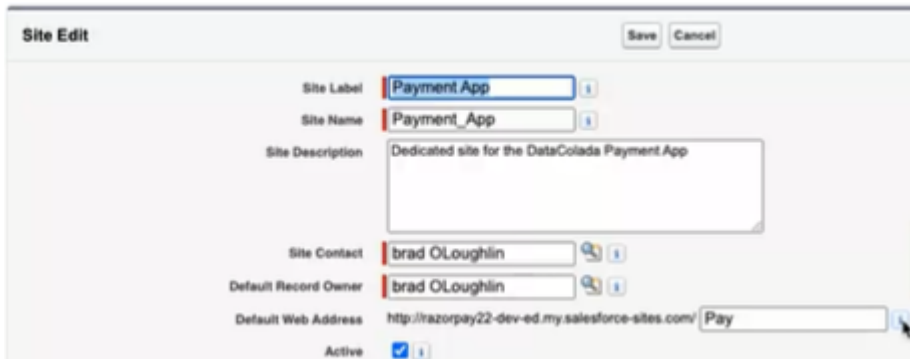
If unsure of the Site Name, go to Setup>Feature Settings>User Interface>Sites and Domains>Sites



3. The next screen will auto generate the webhook URL & Callback URL.



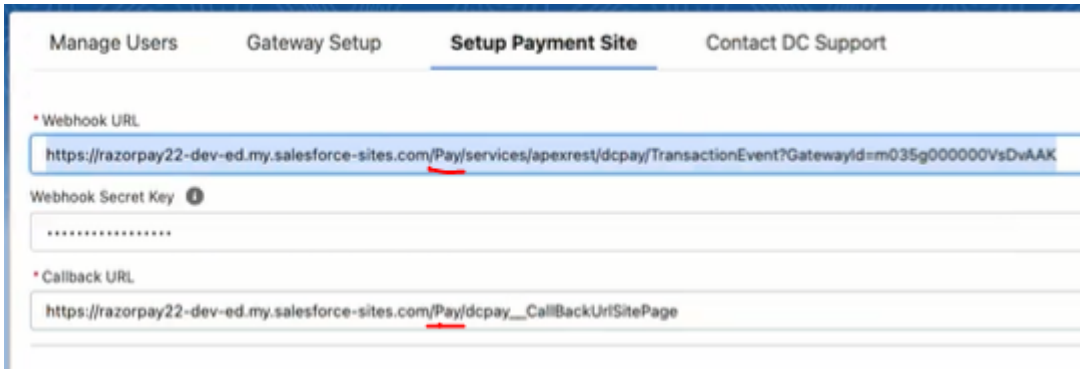
NOTE: If added a Path in your Site URL – (ie: Pay) be sure to edit the Webhook URL & Callback URL



Webhook URL – Autogenerated based on the Site selection in the previous step

Webhook Secret Key – can be provided by the customer or by DataColada (no restriction on characters)

Callback URL - Auto generated for system use only. The checkout screens will be redirected to this URL



4. Click Next and Finish

Post Payment App Setup Configuration

Create a Custom Lookup field on the Payment Request Object to the Opportunity Object

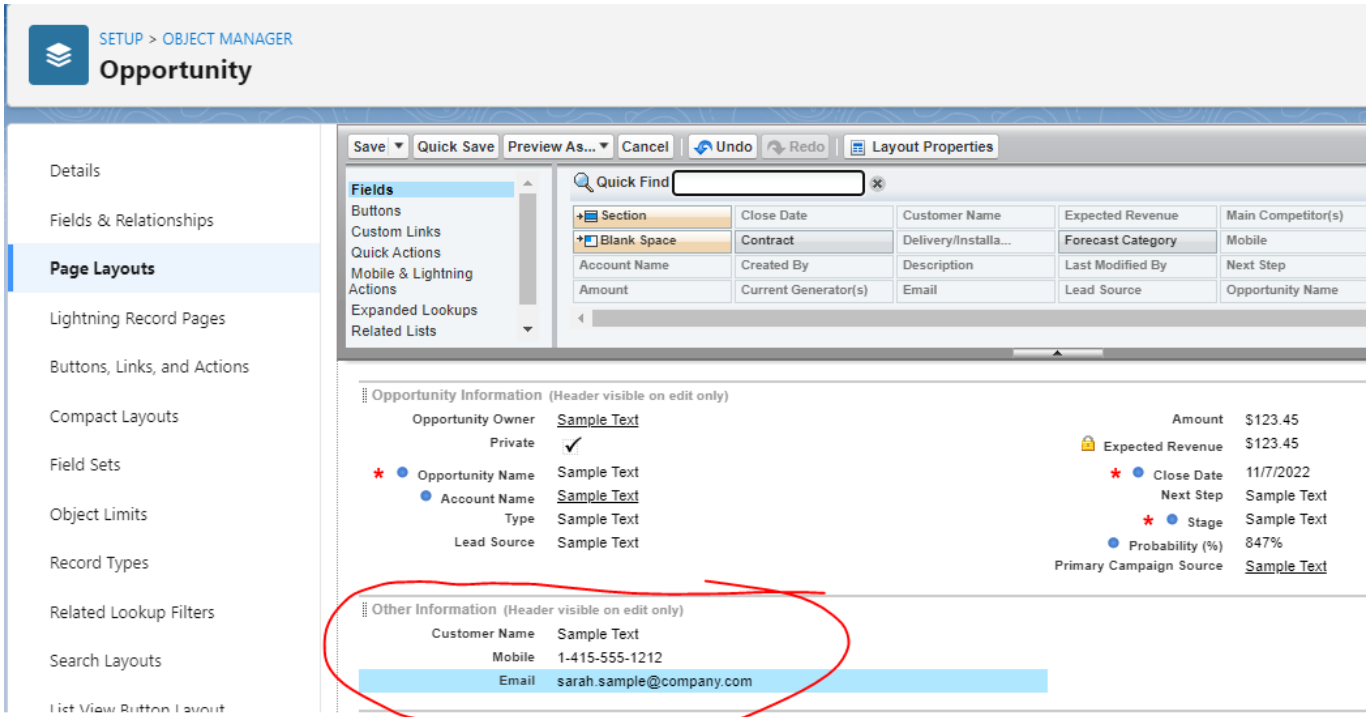
1. In **Setup**, click on the **Object Manager** tab
2. Search and select the **Payment Request** object and then click on **Fields and Relationships**
3. Click on the **New** button to create a new field
4. Select the **Lookup Relationship** (field Type) and click **Next**
5. In the **Related To**, field, select **Opportunity** and click **Next**
6. Tab through the Field Label allowing the Field Name to Auto-populate and click **Next**
Ensure the Child Relationship Name is **Payment_Requests**
7. Set your Visibility fields to the relevant profiles and click **Next**
(we suggest selecting all profiles)
8. Ensure the field is added to all **Payment Request** Page Layouts and click **Next**
9. Ensure the field is added to all **Opportunity** Page Layouts and click **Save**

Add the DC Payment Custom Fields to your designated Object

In our example, we are going to generate our Payment Requests from the Opportunity object. So we will create these custom fields on the Opportunity Object.

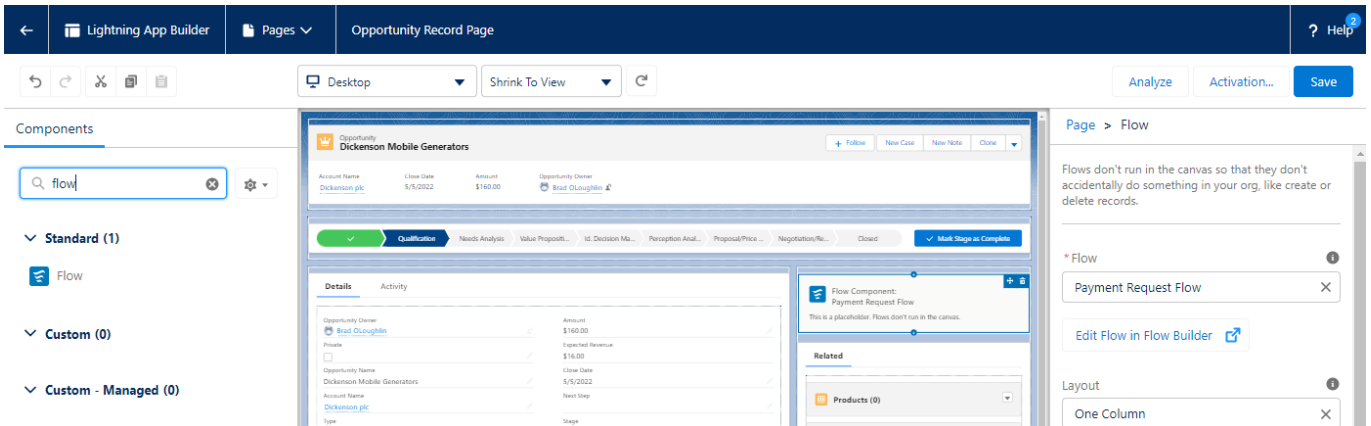
- Customer Name
- Mobile
- Email

NOTE: This can be achieved using Customer's custom fields or Primary Contact Fields (if you have a Lookup relationship established from the Opportunity to the Contact using formula fields)



Add the DC Payment Component to the Opportunity Page

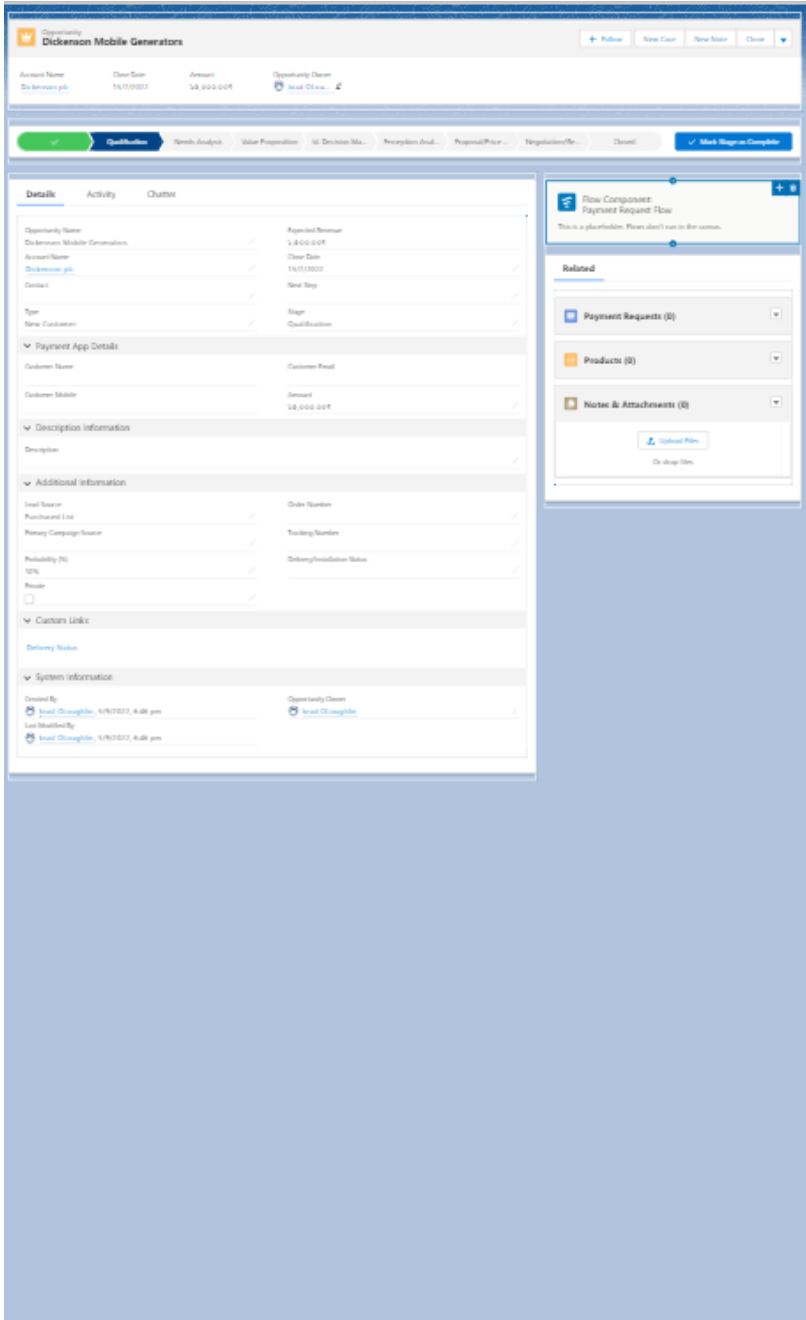
1. On the designated **Lightning Record Page** Layout, add a **Flow** Component
2. In the **Flow** field, Choose the **Payment Request Flow**



Parent Object API Name:	Opportunity__c
Amount:	Amount
Customer Email:	Customer_Email__c

Customer Name:	Customer_Name_c
Customer Mobile:	Customer_Mobile__c

3. Set up the Parent Object (API Name) & Field Mapping



The screenshot shows the 'Details' tab of a 'Payment Request Flow' in the DataColada Payments App. The interface includes a top navigation bar with 'Qualification', 'Search Analytics', 'Value Propositions', 'All Decision Makers', 'Reception Area', 'Proposal Flow', 'Negotiation Flow', and 'Closed'. A 'Mark Stage as Complete' button is visible. The main content area is divided into two sections: 'Details' and 'Activity'. The 'Details' section contains various fields for the flow, including 'Opportunity Name', 'Account Name', 'Customer', 'Type', 'Payment App Details', 'Description Information', 'Additional Information', 'Custom Links', and 'System Information'. The 'Activity' section shows a timeline of events, including 'Created By' and 'Last Modified By'.

Page > Flow

Flows don't run in the canvas so that they don't accidentally do something in your org, like create or delete records.

* Flow

Payment Request Flow

[Edit Flow in Flow Builder](#)

Layout

One Column

Optionally, enter values for these flow variables. Only variables that allow input access are supported.

AmountFieldAPIName

Amount

☐ Pass record ID into this variable

CustomerNameFieldAPIName

Customer_Name__c

☐ Pass record ID into this variable

EmailFieldAPIName

Customer_Email__c

☐ Pass record ID into this variable

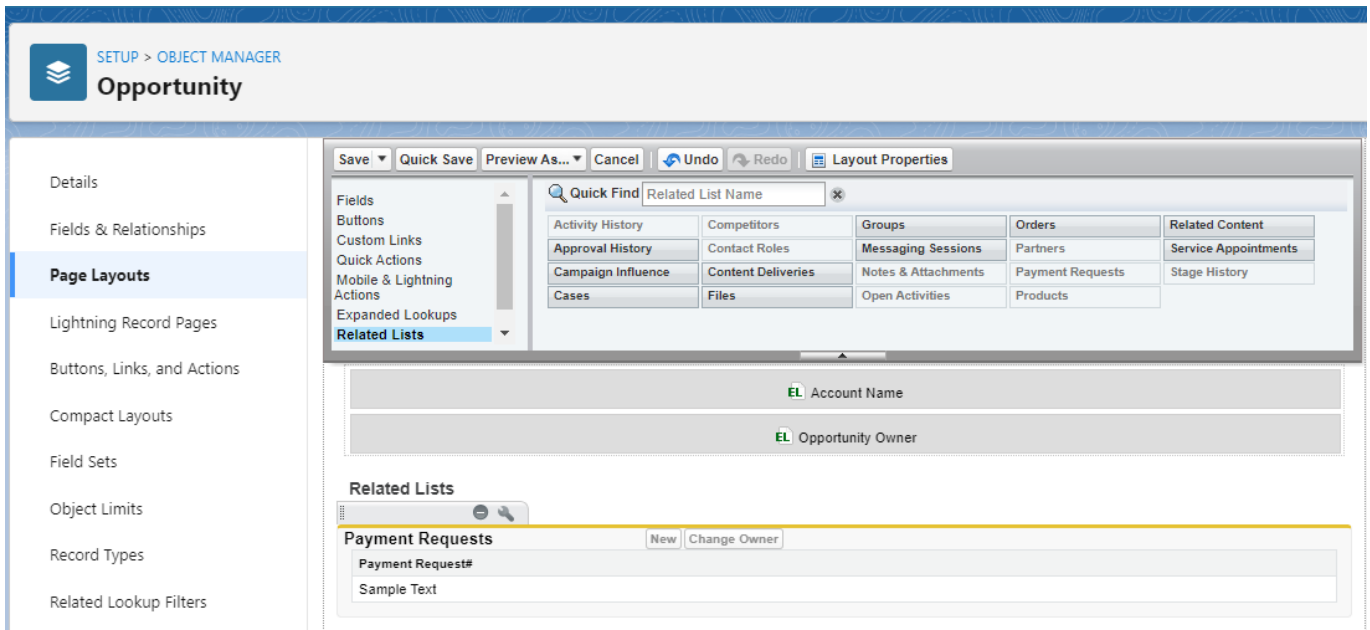
MobileFieldAPIName

Customer_Mobile__c

4. After completing the field mapping, the component should look like this

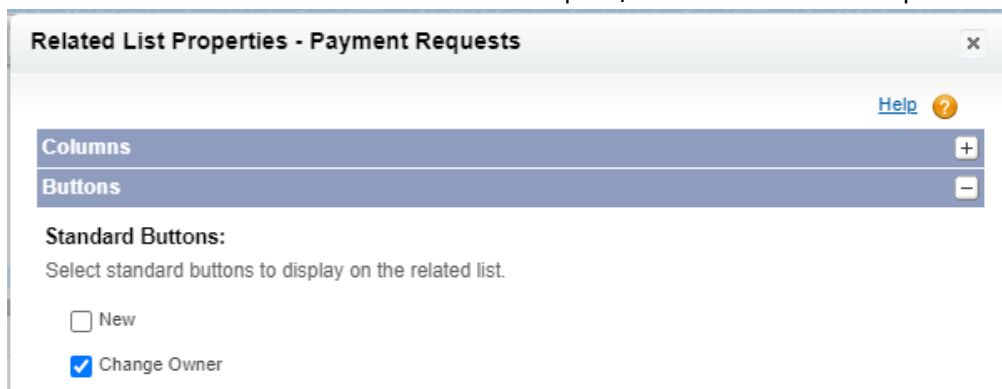
NOTE: In our example, the Amount to be charged to the customer is based on the AMOUNT Field.

- Page 23



Remove the **New** Button from the **Related List**

6. In the Related List for **Payment Request**, click on the **Wrench** icon
7. Add relevant fields to the Columns (such as the fields we just added to the page layout)
8. Click on the **+ icon** on the **Buttons** section to expose/hide the **New** button options



9. Deselect **New** (to remove the New button form the page layout)
10. Click **OK**
11. Then **Save the Page Layout**

Using the DC Payment App

Generate a Link to the Payment

1. To generate a Link for processing the payment, go to the record and **Select payment request type: Link.**

Navigation: Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards More

Opportunity
Dickenson Mobile Generators

+ Follow New Case New Note Clone

Account Name: [Dickenson plc](#) Close Date: 5/5/2022 Amount: \$160.00 Opportunity Owner: [Brad O'Loughlin](#)

Qualificati... Needs An... Value Pro... Id. Decisi... Perceptio... Proposal/... Negotiati... Closed Mark Stage as Complete

Details Activity

Opportunity Owner	Amount
Brad O'Loughlin	\$160.00
Private	Expected Revenue
☐	\$16.00
Opportunity Name	Close Date
Dickenson Mobile Generators	5/5/2022
Account Name	Next Step
Dickenson plc	
Type	Stage
New Customer	Qualification
Lead Source	Probability (%)
Business List	100%

Checkout Screen

Name: Andy Young
Mobile: (785) 265-5350
Email: a_young@dickenson.com
Amount: 160.00

*Select payment request type
☒ Link
☐ Checkout

Next

2. A Payment Request Generated (Success or Failure message will appear)

Navigation: Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards More

Opportunity
Dickenson Mobile Generators

+ Follow New Case New Note Clone

Account Name: [Dickenson plc](#) Close Date: 5/5/2022 Amount: \$160.00 Opportunity Owner: [Brad O'Loughlin](#)

Qualificati... Needs An... Value Pro... Id. Decisi... Perceptio... Proposal/... Negotiati... Closed Mark Stage as Complete

Details Activity

Opportunity Owner	Amount
Brad O'Loughlin	\$160.00

Payment Request Generated Successfully.
Reference #: [a025i000005h2VjAAI](#)

Finish

3. Click on the **Finish** Button

4. A **Payment Request** record will be created on the Opportunity


Opportunity
Dickenson Mobile Generators

[+ Follow](#)
[New Case](#)
[New Note](#)
[Clone](#)

Account Name
[Dickenson plc](#)

Close Date
5/5/2022

Amount
\$160.00

Opportunity Owner
 [Brad O'Loughlin](#)

✓
Qualificati...
Needs An...
Value Pro...
Id. Decisi...
Perceptio...
Proposal/...
Negotiati...
Closed

✓ Mark Stage as Complete

Details
Activity

Opportunity Owner
[Brad O'Loughlin](#)

Private
☐

Opportunity Name
Dickenson Mobile Generators

Account Name
[Dickenson plc](#)

Type
New Customer

Lead Source
Purchased List

Customer Name
Andy Young

Mobile
(785) 265-5350

Email
[a_young@dickenson.com](#)

Order Number

Amount
\$160.00

Expected Revenue
\$16.00

Close Date
5/5/2022

Next Step

Stage
Qualification

Probability (%)
10%

Primary Campaign Source

Main Competitor(s)

Checkout Screen

Name
Andy Young

Mobile
(785) 265-5350

Email
a_young@dickenson.com

Amount
160.00

* Select payment request type
☐ Link
☐ Checkout

Next

Related


Payment Requests (1)

PR-000000

View All

5. To view the new **Payment Request URL** link on The Customer should receive an email with the Payment Request URL Link



Payment Request
PR-000000

[New Contact](#)
[Edit](#)
[New Opportunity](#)

Related
Details
Activity

Payment Request# PR-000000	Owner  Brad O'Loughlin
Request Type Link	Record Type Stripe
Description	Amount \$160.00
Payment Request URL https://buy.stripe.com/test_14k00TdY53Fugp2eUU	Customer Email a_young@dickenson.com
Request Status Sent	Customer Phone (785) 265-5350
Stripe Checkout Url	Customer Name Andy Young
External Order Id 0065i000006Dp2NAAS-2022-07-11 12:38:20	Opportunity Dickenson Mobile Generators
Contact	Account
Parent Record Id	
Parent OrderID 0065i000006Dp2NAAS	

6. Now you can email the customer the Payment Request URL (ie: using a Salesforce Classic Template)



Payment Request
PR-000000

New Contact

Edit

New Opportunity ▾

Related

Details

Activity

New Event

New Task

Log a Call

Email

*From

Brad OLoughlin <brad.oloughlin+publicaccess@datacolada.com>

To

Cc

Bcc

brad.oloughlin+publicaccess@data... X

Subject

Welcome to the GenWatt Community

Arial ▾

Size ▾

B

I

U

A ▾

Dear Andy,

All of us at GenWatt are glad to have you as a customer.

Please find below the Payment Request Link for the Amount of \$160.00

https://buy.stripe.com/test_14k00TdY53Fugp2eUU

Should you have any questions, please feel free to call me at or email me at: brad.oloughlin+publicaccess@datacolada.com.

You can also contact GenWatt on the following numbers:

Main: 810-545-1000

Sales: 810-545-1222

Customer Service & Support: 810-545-1333

Fax: 810-545-1001

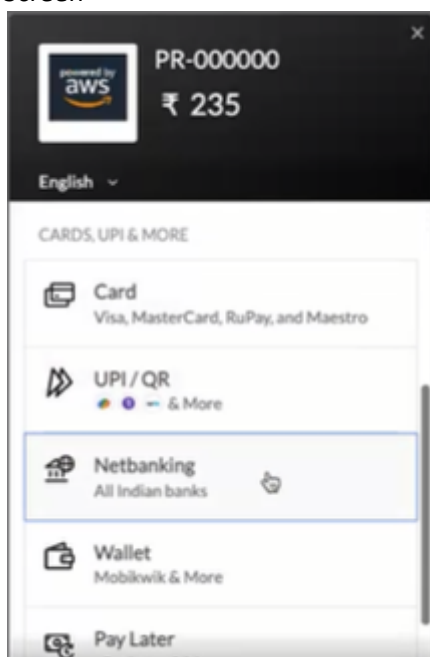
I am confident GenWatt will serve you well and hope to see our relationship grow over the years.

Best Regards,

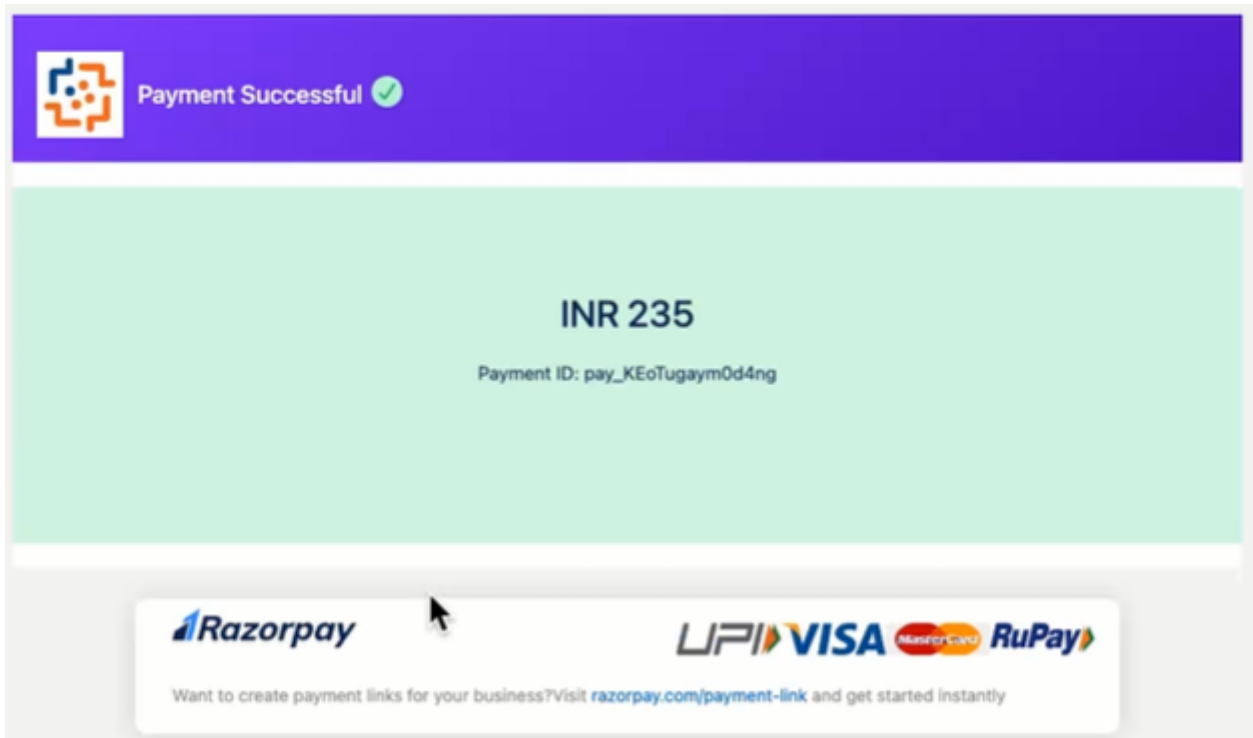
Brad OLoughlin

NOTE: This auto email send feature needs to be built by the customer

- When the customer clicks on the link, a new browser will open taking you to the Razorpay Checkout Screen



8. After the customer enters their details and clicks on the **Pay** button to process the payment and the **Payment Successful** screen will appear



9. The customer will receive a receipt from Razorpay (but not from the Supplier)

NOTE: A custom automation using an email template combined with a PDF creator app could be used to generate a PDF Receipt which could be emailed to the customer

10. To verify the payment, log into your Razorpay account and click on the **Payments** Tab
11. Locate the **Payment Transaction** (in this case: Customer with the email: a_young@dickenson.com)
All details of the payment transaction are included in this screen
12. After the payment has been completed by the customer, the **Payment Transaction** record will be created
(You will need to refresh the browser)


Payment Request
PR-000002

[New Contact](#)
[Edit](#)
[New Opportunity](#)

Details

Activity

Payment Request#	PR-000002	Owner	 Brad O'Loughlin
Request Type		Record Type	Stripe
Link		Amount	\$160.00
Description		Customer Email	a_young@dickenson.com
Payment Request URL	https://buy.stripe.com/test_28o3d55rz7VK7Sw002	Customer Phone	(785) 265-5350
Request Status	Sent	Customer Name	Andy Young
Stripe Checkout Url		Opportunity	Dickenson Mobile Generators
External Order Id	0065i000006Dp2NAAS-2022-07-11 16:07:50	Account	
Contact			
Parent Record Id			
Parent OrderID	0065i000006Dp2NAAS		


Payment Transactions (1)

TN-00000

Amount: \$160.00
Transaction ... evt_1LKFn6AafH8x2kHw0Oudl1KW
Status: complete

View All

And a **Payment Transaction History** (related record)


Payment Transaction
TN-00000

[Initiate Refund](#)

Details

Activity

Transaction Number	TN-00000	Owner	 Brad O'Loughlin
Amount	\$160.00	Status	complete
Order Id		Payment Request	PR-000002
Customer id		Method	
Amount Refunded		Token Id	
Event Type		Transaction Id	evt_1LKFn6AafH8x2kHw0Oudl1KW
Is Partial Payment	☐	International?	☐
Stripe Payment Intent	pi_3LKFn4AafH8x2kHw0mqTFtQm	Fee	


Payment Transaction History (1)

Date:

Field:

User:

Original Value:

New Value:

11/7/2022, 4:08 pm

Created.

[DCPaymentSite Site Guest User](#)

View All


Payment Refunds (0)

Request

Internal Payment Request

If you are taking a credit card payment over the phone:

1. Using the **Checkout** option of the **Select payment request type**: Checkout
2. and click **Next**

 Opportunity
Edge SLA

[+ Follow](#)
[New Case](#)
[New Note](#)
[Clone](#)

Account Name
[Edge Communications](#)

Close Date
19/5/2022

Amount
₹60,000.00

Opportunity Owner
 [brad O'Loughlin](#)

✓

✓

✓

✓

✓

✓

✓

✓

✓

✓

Closed ...

◀

▶

Change Closed Stage

Details
Activity
Chatter

Opportunity Name
Edge SLA

Expected Revenue
₹60,000.00

Account Name
[Edge Communications](#)

Close Date
19/5/2022

Contact
[Sean Forbes](#)

Next Step

Type
Existing Customer - Upgrade

Stage
Closed Won

Payment App Details

Customer Name
Sean Forbes

Customer Email
sean@edge.com

Customer Mobile
(512) 757-4561

Amount
₹60,000.00

Checkout Screen

Name
Sean Forbes

Mobile
(512) 757-4561

Email
sean@edge.com

Amount
60000.00

*Select payment request type

☒ Link
☐ Checkout

Next

Related

3. A Payment Request code is generated

 Opportunity
Edge SLA

[+ Follow](#)
[New Case](#)
[New Note](#)
[Clone](#)

Account Name
[Edge Communications](#)

Close Date
19/5/2022

Amount
₹60,000.00

Opportunity Owner
 [brad O'Loughlin](#)

✓

✓

✓

✓

✓

✓

✓

✓

✓

✓

Closed ...

◀

▶

Change Closed Stage

Details
Activity
Chatter

Opportunity Name
Edge SLA

Expected Revenue
₹60,000.00

Account Name
[Edge Communications](#)

Close Date
19/5/2022

Payment Request Generated Successfully.
Reference #: **a025g00000AKJNmAAP**

Payment Link
<https://rzp.io/i/jilbLaWzLJ>

Finish

- If you click on the Finish button, a new Payment Request record has been created and linked to the **Opportunity Record**, click on the **Payment Request** record


Opportunity
Edge SLA

[+ Follow](#)
[New Case](#)
[New Note](#)
[Clone](#)

Account Name

Edge Communications

Close Date

19/5/2022

Amount

₹60,000.00

Opportunity Owner

 brad OLoughlin

✓

✓

✓

✓

✓

✓

✓

✓

✓

Closed ...

Change Closed Stage

Details

Activity

Chatter

Opportunity Name

Edge SLA

Expected Revenue

₹60,000.00

Account Name

Edge Communications

Close Date

19/5/2022

Contact

Sean Forbes

Next Step

Type

Existing Customer - Upgrade

Stage

Closed Won

Payment App Details

Customer Name

Sean Forbes

Customer Email

sean@edge.com

Customer Mobile

(512) 757-4561

Amount

₹60,000.00

Description Information

Description

Additional Information

Lead Source

Order Number

Checkout Screen

Name

Sean Forbes

Mobile

(512) 757-4561

Email

sean@edge.com

Amount

60000.00

Select payment request type

☒ Link
 ☐ Checkout

Next

Related

Payment Requests (1)

PR-000003

Custom...

sean@edge.com

Custom...

Sean Forbes

Custom...

(512) 757-4561

- The **Payment Request** contains the **Razorpay Checkout URL**
- When you click on the **Razorpay Check URL** it opens a new browser and takes you directly to the payment page (for the End User – for Community or External Website)


Payment Request
PR-000003

[New Contact](#)
[Edit](#)
[New Opportunity](#)

Details
Activity

Payment Request#	PR-000003	Account	Edge Communications
Opportunity	Edge SLA	Customer Name	Sean Forbes
Contact	Sean Forbes	Customer Phone	(512) 757-4561
Request Type	Link	Customer Email	sean@edge.com
Request Status	Sent	Amount	₹60,000.00
Description		Payment Request URL	https://rzp.io/i/jljbLaWzLJ


Payment Transactions (0)

- Complete the Customers payment details with the Card Details and press the **Proceed** button

This payment link is created in **Test Mode**. Only test payments can be made for this.

Payment Request from Sandip Singh

PAYMENT FOR

Payment Link - Sean Forbes

RECEIPT

0065g00000Oiv6TAAR-1662516980

EXPIRE BY

Sep 7, 2022 (5:16 PM)

AMOUNT PAYABLE

INR 60000.00

Sandip Singh
#KEqH0E9gQ26lgJ

₹ 60,000

English

Country
+91 Phone Number

Email

 This payment is secured by Razorpay.

PROCEED




Want to create payment links for your business? Visit razorpay.com/payment-links and get started instantly.

- The Salesforce User can enter the customer's payment details (over the phone) into the Razorpay Payment screen and complete the payment process.

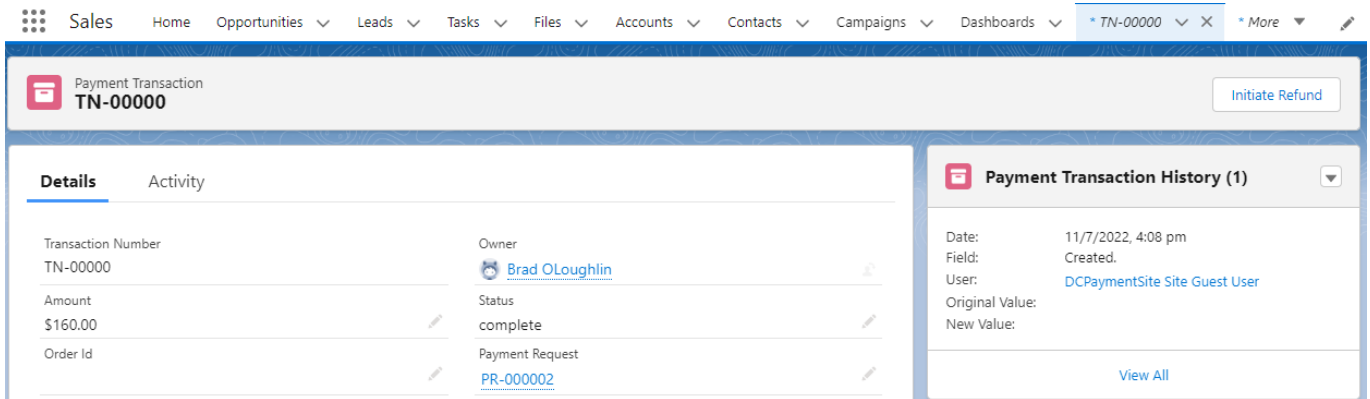


Payment Successful 

9. A **Payment Transaction** Record will also be created against the **Payment Request**
10. When you click on the **Payment Transaction** Record, you can see the Payment Transaction History

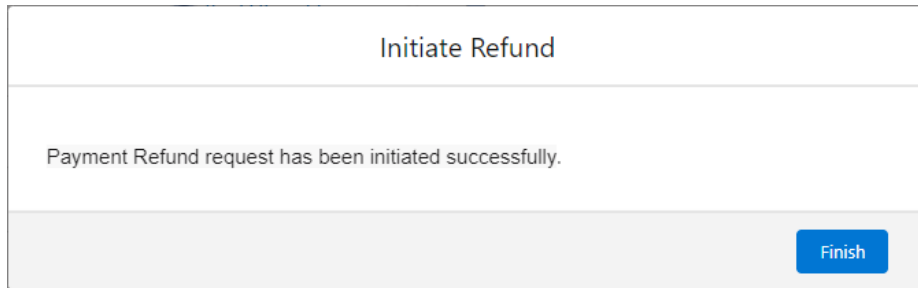
Initiate Refund

1. On the **Payment Transaction** Record page, click on the **Initiate Refund** button



The screenshot shows the 'Payment Transaction' record for TN-00000. The top navigation bar includes links for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, and Dashboards. The main content area has a 'Details' tab selected, showing transaction information: Transaction Number (TN-00000), Amount (\$160.00), Order Id, Owner (Brad O'Loughlin), Status (complete), and Payment Request (PR-000002). A right-hand panel titled 'Payment Transaction History (1)' shows the date (11/7/2022, 4:08 pm), field (Created), user (DCPaymentSite Site Guest User), and original/new values. An 'Initiate Refund' button is located in the top right corner of the transaction record area.

2. Type in the Amount to be refunded
NOTE: The Amount can not exceed the Payment Record amount
3. The Confirmation Screen (To be developed by Satya)



The confirmation screen is titled 'Initiate Refund'. It displays the message: 'Payment Refund request has been initiated successfully.' At the bottom right, there is a blue button labeled 'Finish'.

4. Verify the refund has been successful in the Razorpay Account in the **All Payments**

Use DC Payment Package API

In case customer has their own form solution(LWC) and want to capture payment via this form (either through public site or community) then our API can be called from LWC JS controller as below -

LWC JS Controller -

```
redirectToHome(){
    this.showspinner=true;
    createPaymentRequest({applicationId: this.applicationRecord.Id})
        .then(data => {
            if(data){
                this.showspinner=false;
                const config = {
                    type: 'standard__webPage',
                    attributes: {
                        url: data.paymentSiteBaseUrl + '?id=' + data.paymentRequestId
                    }
                };
                this[NavigationMixin.Navigate](config);
            }
        })
        .catch(error => {
            this.showspinner=false;
            this.showToast(message, "error");
        });
}
```

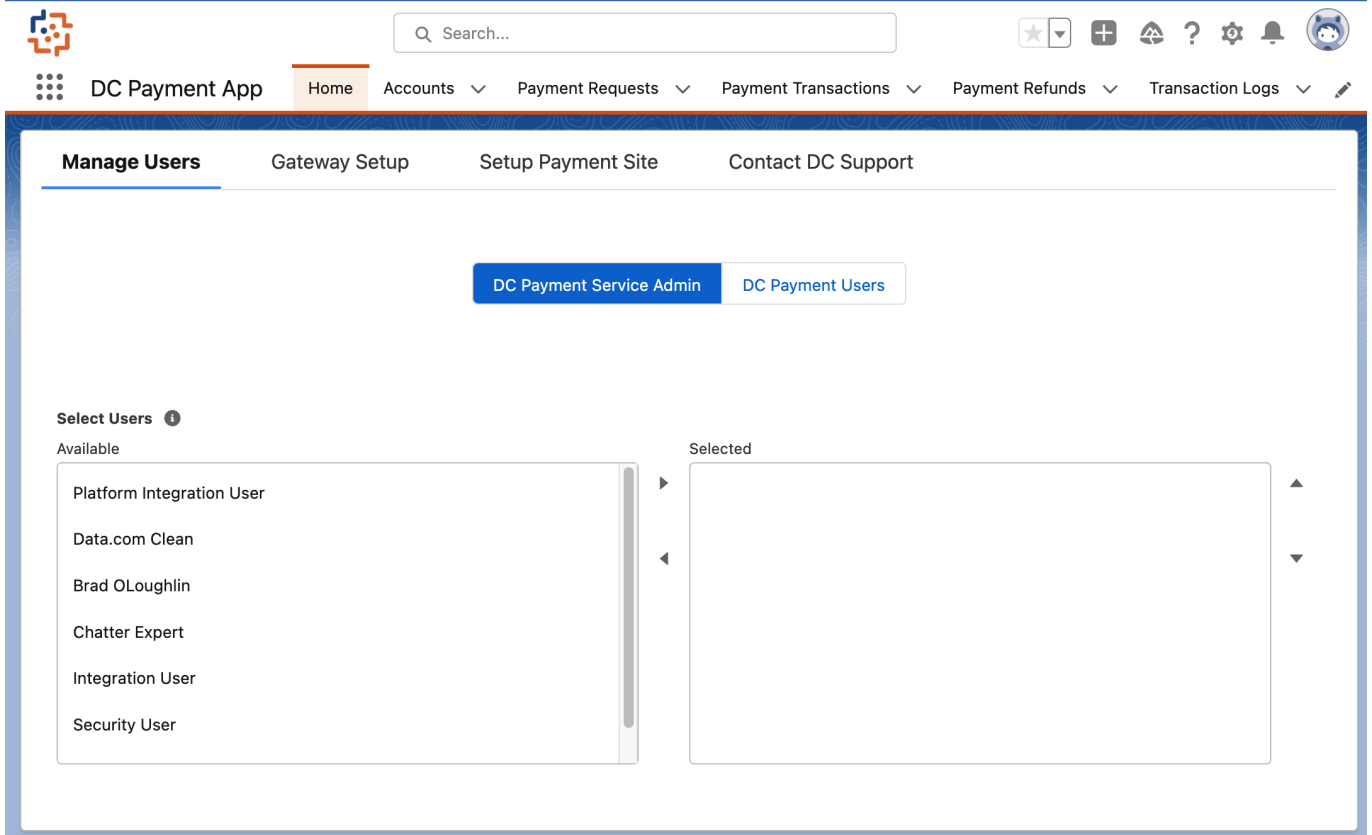
Apex Code -

```
DC_Payment_Gateway_Configuration__c dcPayGateConfig = DC_Payment_Gateway_Configuration__c.getOrgDefaults();
Site getSiteDetails = [SELECT Name,Subdomain,OptionsRequireHttps FROM Site
                        WHERE Status = 'Active' AND Name =: dcPayGateConfig.Payment_Site_Name__c];
Organization org = [SELECT InstanceName,Name,IsSandbox,OrganizationType FROM Organization];
String siteBaseUrl = 'https://';
if(getSiteDetails != null && getSiteDetails.Subdomain != null && getSiteDetails.OptionsRequireHttps == true){
    if(org.IsSandbox == true) {
        siteBaseUrl += UserInfo.getUserName().substringAfterLast('.')+'-';
    }
    siteBaseUrl += getSiteDetails.Subdomain + '.';
    siteBaseUrl += (org.IsSandbox || org.OrganizationType == 'Developer Edition' ?
    [org.InstanceName.toLowerCase() + '.'] : '') + 'force.com';
}

PaymentRequestWrapper prw = new PaymentRequestWrapper();
if(orderObj != null && !orderObj.isEmpty()){
    GeneratePaymentRequestInvocable.PaymentRequests request = new GeneratePaymentRequestInvocable.PaymentRequests();
    request.paymentOrderId = orderObj[0].Id;
    request.paymentType = 'checkout';
    request.CustomerName = (String)orderObj[0].Application__r.hed__Applicant__r.Name;
    request.CustomerEmail = (String)orderObj[0].Application__r.hed__Applicant__r.Email;
    request.CustomerPhone = (String)orderObj[0].Application__r.hed__Applicant__r.Phone;
    request.Amount = string.valueOf(orderObj[0].Total_Amount__c);
    request.parentObjectAPIName = 'Enrolment_Order__c';
    List<GeneratePaymentRequestInvocable.RequestsResult> result =
    GeneratePaymentRequestInvocable.generatePaymentRequest(new List<GeneratePaymentRequestInvocable.PaymentRequests>{request});
    prw.paymentRequestId = result[0].paymentRequest.Id;
    prw.paymentSiteBaseUrl = siteBaseUrl;
    return prw;
}
```

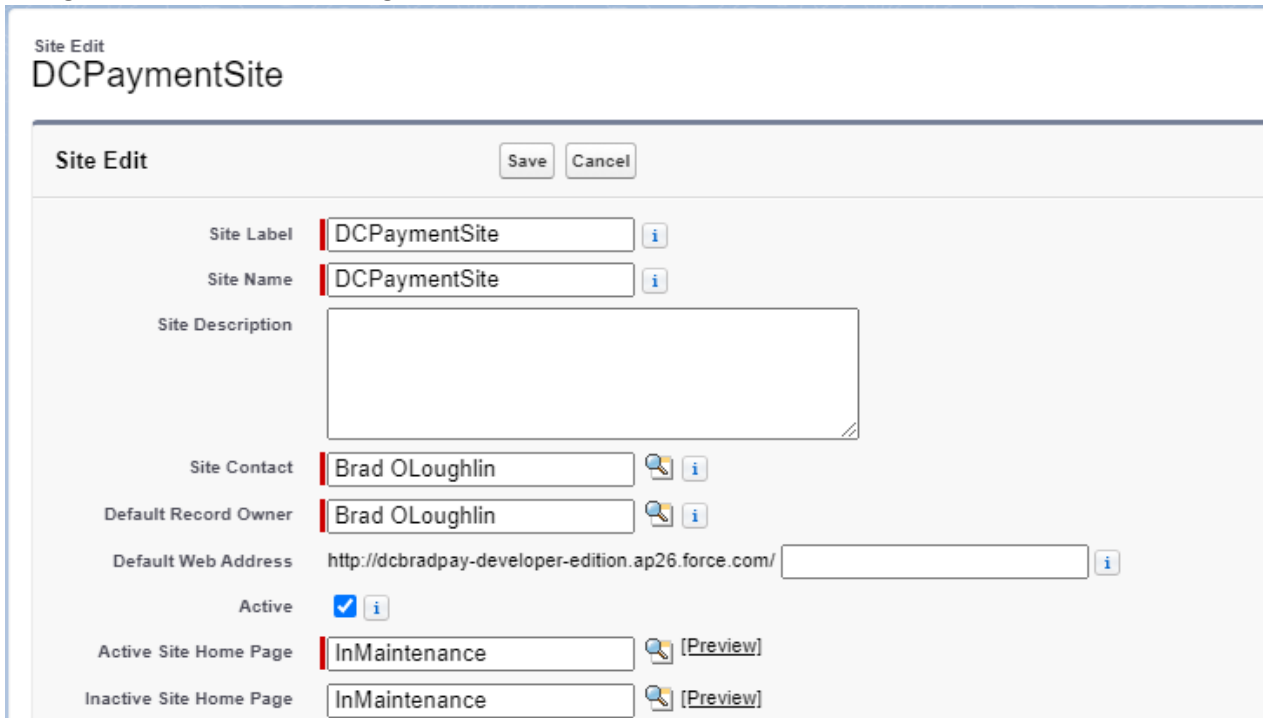
Uninstalling the Payment App

1. Before Uninstalling the package, be sure to remove the Permission Sets from the Users



The screenshot shows the 'DC Payment App' interface. The top navigation bar includes 'Home', 'Accounts', 'Payment Requests', 'Payment Transactions', 'Payment Refunds', and 'Transaction Logs'. The 'Manage Users' section is active, showing a list of users under 'Available' and an empty 'Selected' list. The 'Available' list includes: Platform Integration User, Data.com Clean, Brad OLoughlin, Chatter Expert, Integration User, and Security User. The 'Selected' list is empty.

2. Remove the DC Payment App Fields from the page layouts
3. And Delete the Opportunity Lookup field on the Request Payment Object
4. In Setup got to Sites and click the edit (link) next to the Site for the DC Payment App
5. Change the Active Site Home Page to: In Maintenance



The screenshot shows the 'Site Edit' form for 'DCPaymentSite'. The form includes the following fields and values:

- Site Label: DCPaymentSite
- Site Name: DCPaymentSite
- Site Description: (Empty text area)
- Site Contact: Brad OLoughlin
- Default Record Owner: Brad OLoughlin
- Default Web Address: http://dcbradpay-developer-edition.ap26.force.com/
- Active: ☒
- Active Site Home Page: InMaintenance
- Inactive Site Home Page: InMaintenance

6. In Setup, search and select Installed Packages
7. Uninstalling the Package:
8. When the Uninstalling of Package is Successful:

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your Salesforce org.

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially installed as features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Installed Packages

No packages installed

Uninstalled Packages

No uninstalled package data archives