

SALESFORCE PAYPAL TRANSACTION CONNECTOR - USER GUIDE

Welcome to the Salesforce PayPal Transaction Connector User Guide, your go-to resource for setting up, customizing, exporting data and accessing the data to proceed to seamlessly transform the incoming data into your own standard/custom object records using flows and triggers as needed.

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1. Setup

Org's PayPal Connection Configuration (Required)

Navigate to Setup > Custom Metadata Types > Click Manage Records on PayPal Transaction Integration Setting > Click Edit on ConnectionConfig record > Enter on Value textbox with either one of the below listed values

1. PayPal_Named_Credential
2. PayPal_Sandbox_Named_Credential

PayPal_Named_Credential corresponds to PayPal Production Environment Endpoint Connection.
PayPal_Sandbox_Named_Credential corresponds to PayPal Sandbox Environment Endpoint Connection.

NamedCredential Update (Required)

Navigate to Setup > Named Credentials > Click either PayPal_Named_Credential or PayPal_Sandbox_Named_Credential (based your above ConnectionConfig) > Edit > Enter values for the below fields

1. Username: Client ID from your PayPal API Credentials.
2. Password: Secret key from your PayPal API Credentials.

> Click Save

Please check on your PayPal Account to make sure your PayPal API Credentials has the Transaction search access.

Send Error Emails Configuration (Required)

Navigate to Setup > Custom Metadata Types > Click Manage Records on PayPal Transaction Integration Setting > Click Edit on SendErrorEmailsTo record > Enter on Value textbox with the email addresses to whom you want to send error details in case of any exceptions. If not set, error details go to running user email.

SharingRule Configuration (When necessary)

The "PayPal_Transaction__c" object has private organization-wide sharing defaults. To provide access to the relevant user roles or groups, please establish custom sharing rules for PayPal_Transaction__c records.

PermissionSet Assignment (When necessary)

As needed, assign the 'PayPal_Data_Permissions' permission set to users who need access to the 'PayPal Transaction Integration' app with 'PayPal_Transaction__c' tab/records. This permission set grants the necessary permissions for managing PayPal transactions within Salesforce.

2. Customize

Customize with Custom Metadata: Use the 'Salesforce_PayPal_Transaction_Settings__mdt' Custom Metadata Type records to customize the below features.

1. AccountRecordTypeDeveloperName: Set a specific Account Record Type when creating Account records during the export of PayPal Transactions to Salesforce.

2. ContactRecordTypeDeveloperName: Set a specific Contact Record Type when creating Contact records during the export of PayPal Transactions to Salesforce.

3. ExcludeAccountContact: This feature provides the flexibility to prevent the creation of unnecessary accounts and contacts when exporting PayPal Transactions to Salesforce. By default, this setting is configured to exclude such creations. It is important to adjust this setting to align with your specific requirements, considering the following mappings:

For Account creation, the fields that are mapped for insertion include Name, Shipping Address, and Billing Address.

For Contact creation, the fields that are mapped for insertion include FirstName, LastName, Email, Mailing Address, and Other Address.

So be sure to configure this setting accordingly to ensure a smooth integration, while keeping in mind that no Account/Contact Validations should disrupt the process.

4. PageSize: Adjust the 'PageSize' to set the number of records exported per API call in the Queueable Apex. This allows you to control the size of each batch of records processed.

5. ExcludedTransactionEventCodes: Accepts semi-colon separated PayPal transaction event codes. Defaults to T0400 which excludes exporting general withdrawal transactions. To add more event exclusions, please use event codes on the PayPal documentation:
<https://developer.paypal.com/docs/transaction-search/transaction-event-codes/>.

6. IncludedTransactionStatus: Accepts semi-colon separated status. Defaults to S - successful transactions. Please use status values on the PayPal documentation:
https://developer.paypal.com/docs/api/transaction-search/v1/#search_get!in=query&path=transaction_status&t=request.

3. Scheduled Data Export

The post-deployment script that runs during the installation of this package should have scheduled the Apex class called "PayPalDataScheduler" to automatically execute daily at 3 AM. Please confirm that the scheduled job, named "PayPalDataScheduler - Everyday 3AM," exists in the Setup > Scheduled Jobs section. Feel free to adjust the configuration of this scheduled job to suit your specific requirements.

Please ensure that the "PayPal_Data_Permissions" Permission Set is assigned to the user responsible for scheduling this job.

4. One-Time Data Export for Existing PayPal Transactions (Optional)

If you wish to export existing transactions from your PayPal account to Salesforce, please follow the steps below before running the provided anonymous script:

1. Adjust the 'startDate' and 'endDate' to suit your specific requirements.
2. Note that this script will execute a series of queueable Apex jobs to export your data. The number of jobs in the chain is determined by the specified 'startDate' and 'endDate'.
3. You can abort the execution of the job chain at any time by setting the custom metadata 'salesforce_paypal_transaction_settings.Killcurrentdatamigrationfailsafe' value to 'true'.

Execute the anonymous script as follows:

```
// Set the start and end dates
Datetime startDate = Date.newInstance(2023, 10, 01).addDays(1);
Datetime endDate = Date.newInstance(2023, 10, 31).addDays(1);
// Queue the jobs
System.enqueueJob(new sptc.PayPalDataExportQueueable(
    true, startDate, endDate, 1, 200,
    Boolean.valueOf(sptc__Salesforce_PayPal_Transaction_Settings__mdt.getInstance('ExcludeAccountC
ontact').sptc__Value__c),
    null, startDate
));
```

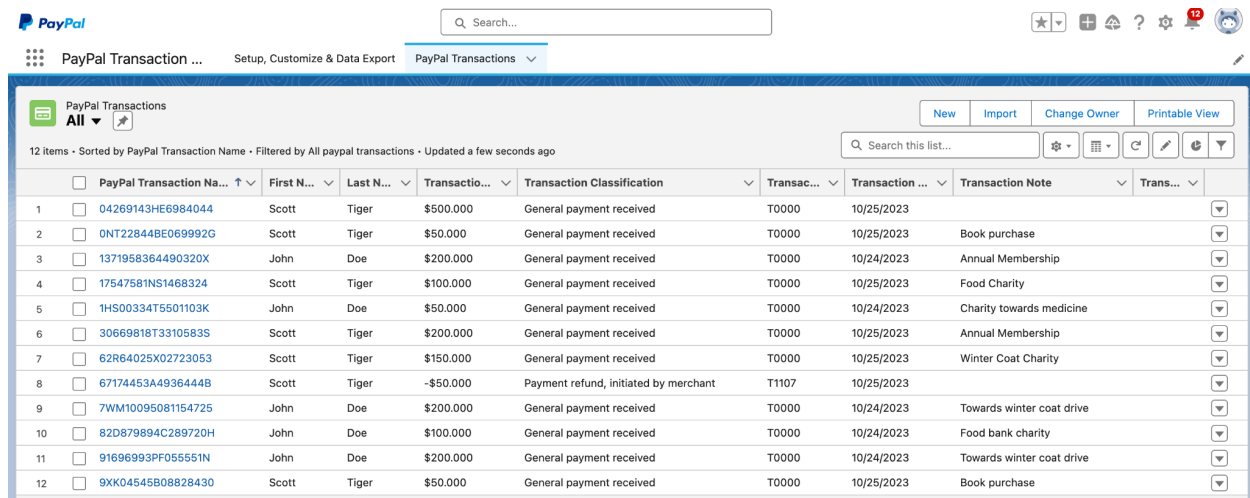
To monitor the progress of the job chain, navigate to Setup > Apex Jobs. Ensure that all the jobs are marked as complete. Afterward, visit the PayPal Transactions Tab to verify if all PayPal transactions have been successfully exported. If not, review the logs and adjust the 'startDate' and 'endDate' values in the script as needed, then rerun the script.

5. Accessing the Data via PayPal Transaction Integration App

To access your data through the PayPal Transaction Integration App, follow these steps:

1. Go to the App Launcher in your Salesforce environment.
2. Select the "PayPal Transaction Integration App" from the available apps.
3. Once you're inside the app, navigate to the "PayPal Transaction Tab" to access and review your PayPal account's transaction data. Ensure that the data is exported correctly.

The displayed data should resemble the sample data shown in the screenshot.



	PayPal Transaction Na...	First N...	Last N...	Transactio...	Transaction Classification	Transac...	Transaction ...	Transaction Note	Trans...
1	04269143HE6984044	Scott	Tiger	\$500.000	General payment received	T0000	10/25/2023		
2	0NT22844BE069992G	Scott	Tiger	\$50.000	General payment received	T0000	10/25/2023	Book purchase	
3	1371958364490320X	John	Doe	\$200.000	General payment received	T0000	10/24/2023	Annual Membership	
4	17547581NS1468324	Scott	Tiger	\$100.000	General payment received	T0000	10/25/2023	Food Charity	
5	1HS00334T5501103K	John	Doe	\$50.000	General payment received	T0000	10/24/2023	Charity towards medicine	
6	30669818T3310583S	Scott	Tiger	\$200.000	General payment received	T0000	10/25/2023	Annual Membership	
7	62R64025X02723053	Scott	Tiger	\$150.000	General payment received	T0000	10/25/2023	Winter Coat Charity	
8	67174453A4936444B	Scott	Tiger	-\$50.000	Payment refund, initiated by merchant	T1107	10/25/2023		
9	7WM10095081154725	John	Doe	\$200.000	General payment received	T0000	10/24/2023	Towards winter coat drive	
10	82D879894C289720H	John	Doe	\$100.000	General payment received	T0000	10/24/2023	Food bank charity	
11	91696993PF055551N	John	Doe	\$200.000	General payment received	T0000	10/24/2023	Towards winter coat drive	
12	9XX04545B08828430	Scott	Tiger	\$50.000	General payment received	T0000	10/25/2023	Book purchase	

After reviewing and analyzing the data, consider implementing a record-based flow or trigger on the 'PayPal_Transaction__c' object. This will facilitate the seamless transformation of incoming data into your standard or custom object records. This customization enables you to tailor the integration to meet your specific business requirements effectively.