

Worldpay App Admin Setup

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Installation

- ❖ Search for Launchpad App on Salesforce App Exchange.
 - Select Install for Admins Only.
 - Check the acknowledgement box.
 - Click Install.



Install Worldpay Referral App

By Worldpay



☒ **Install for Admins Only**



☐ **Install for All Users**



☐ **Install for Specific Profiles...**

 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
Worldpay Referral App	Worldpay	ver 0.1	0.1 (Beta 67)

Additional Details [View Components](#)

Grant access to the third-party web sites 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
apis.cert.worldpay.com	☒

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

[Continue](#) [Cancel](#)

Wait for the installation to complete then click done, you will be redirected to your salesforce environment.



Install Worldpay Referral App

By Worldpay

**Installation Complete!**

[Done](#)

App Name	Publisher	Version Name	Version Number
Worldpay Referral App	Worldpay	ver 0.1	0.1 (Beta 67)

Worldpay Admin Permission Set

After installing the application, the Salesforce Admin needs to assign the “Worldpay Admin” Permission to himself.

 **SETUP**
Users

User
V2 Test
[Permission Set Assignments \(0\)](#) | [Permission Set Assignments Activation Required \(0\)](#) | [Permission Set Group Assignments \(0\)](#) | [Permission Set License Assignments \(0\)](#) | [Lightning Data Purchase Assignments \(0\)](#) | [Personal Groups \(0\)](#) | [Public Group Members \(0\)](#)

Permission Set Assignments [Edit Assignments](#)
No records to display [Edit Assignments](#)

Alias	vtest	User License	Salesforce
Email	edson.garcia@perfcient.com [Verified]	Profile	System Administrator

Permission Set Assignments
V2 Test

Available Permission Sets
Salesforce CMS Integration Admin
Salesforce Console User
Salesforce Contracts Analytics Admin
Salesforce Contracts Analytics User
SeaS Indexing C2C User Perm
Slack Service User
Standard Einstein Activity Capture
Trust Card Manager
Worldpay User
Your Account App Admin User

Enabled Permission Sets
Worldpay Admin

Add

Remove

Save

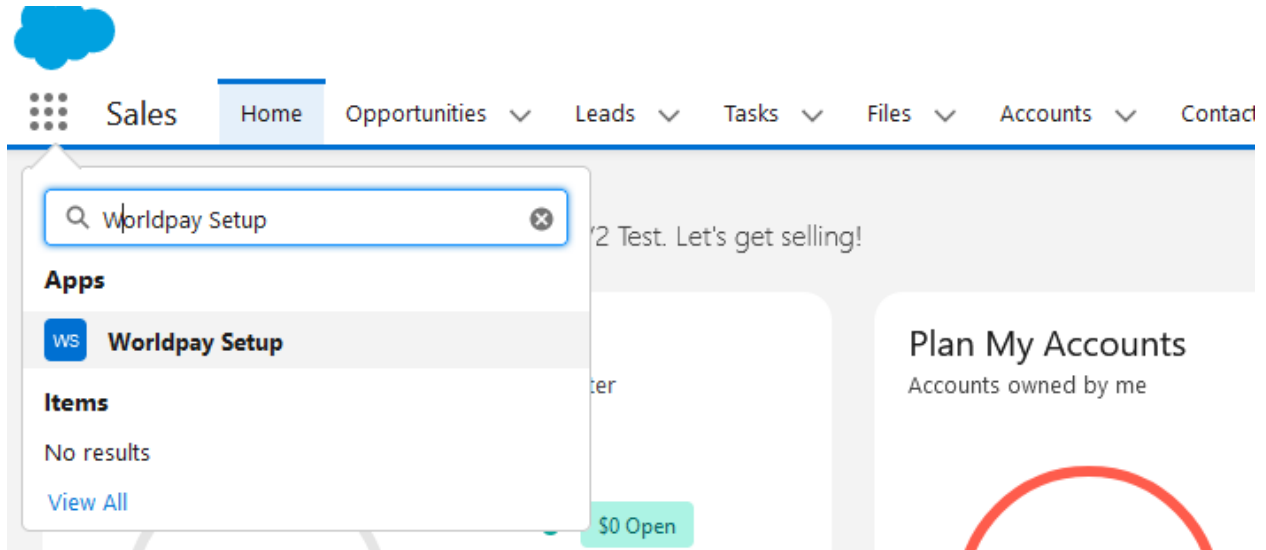
Cancel

Save

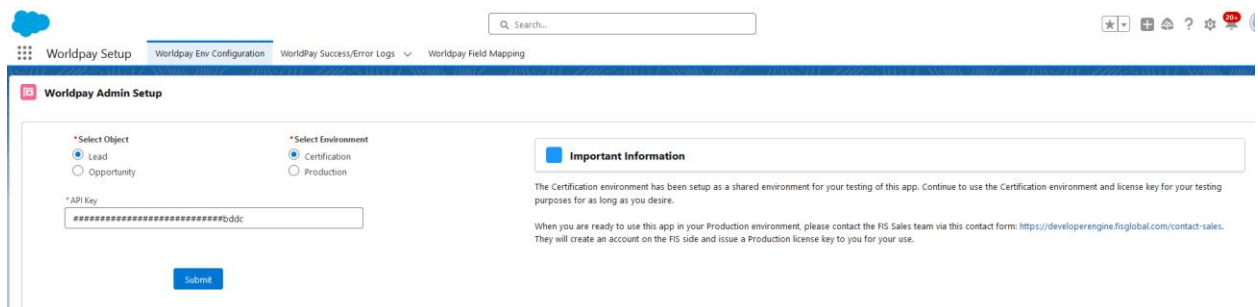
Cancel

Worldpay Setup App

With the Permission set assigned, the Admin can have access to the Worldpay Setup App.



When opening the app you will be presented with 3 tabs.



*This App is only accessible for Admins.

Worldpay Env Configuration

In this tab you can:

- Select the object to use on the mapping.
- Select the environment.
- Add or update the API key to use.

When clicking submit you will be presented with a Success message.

Worldpay Admin Setup

Success
Worldpay Environment Configuration saved successfully!

Select Object

☐ Lead

☒ Opportunity

Select Environment

☐ Certification

☐ Production

* API Key

#####bdc

Submit

Important Information

The Certification environment has been setup as a shared environment for purposes for as long as you desire.

When you are ready to use this app in your Production environment, please They will create an account on the FIS side and issue a Production license

Production URL

On Setup -> Custom Metadata Types, select **Manage Records** for **WorldpayEnvConfigCM**, then select Default Record and add the **Production Environment URL** field to the Layout.

Setup

Custom Metadata Types

WorldpayEnvConfigCM (Managed)

This WorldpayEnvConfigCM is managed, meaning that you may only edit certain attributes. [Click for More Information](#)

WorldpayEnvConfigCM Detail

Field	Value
WorldpayEnvConfigCM Name	DefaultRecord
Environment	Certification
Created By	Cesar Martinez
Created Date	11/10/2024 11:09 AM

Fields

Field	Value
Production Environment URL	https://api.sandbox.worldpay.com/merchant-boardings/leads

This field needs to be updated with the value that will be provided by WorldPay

Remote Site Settings

On Remote Site Settings (Setup -> Remote Site Settings) entries for the certification and production URLs need to be set.

The screenshot shows the Salesforce Setup interface. The left sidebar contains the 'Setup' menu with 'Remote Site Settings' highlighted under the 'Security' section. The main content area is titled 'Remote Site Settings' and displays a table of remote sites. The table has columns for Action, Remote Site Name, Namespace Prefix, Remote Site URL, Active status, Created By, Created Date, Last Modified By, and Last Modified Date. Two entries are listed: 'WorldPayProdPaymentWebh' and 'WorldPayProdPaymentFRSQ'. Both are active and created by 'Martinez, Cesar'.

Setup

Home Object Manager

Q Remote Site

Security

Remote Site Settings

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

Remote Site Settings

All Remote Sites

Below is the list of Web addresses that your organization can invoke from salesforce.com. To add another Web address, click New Remote Site.

View: All Remote Sites Create New Site

Action	Remote Site Name *	Namespace Prefix	Remote Site URL	Active	Created By	Created Date	Last Modified By	Last Modified Date
Edit Del	WorldPayProdPaymentWebh	WorldPay	https://api.certuonflow.com	✓	Martinez, Cesar	11/16/2024, 11:09 AM		11/16/2024, 11:09 AM
Edit Del	WorldPayProdPaymentFRSQ	-	https://api.certuonflow.com	✓	Martinez, Cesar	12/6/2024, 8:48 AM		12/6/2024, 8:48 AM

Worldpay Field Mapping

On this tab you will see the mapping screen for the object selected on the previous screen.

*In this example we have Opportunity selected.

The first time all the fields will be Not Mapped, you need to fill at least the required fields.



Q Search...

Worldpay Setup

Worldpay Env Configuration

WorldPay Success/Error Logs

Worldpay Field Mapping

Worldpay Label	Worldpay API	Opportunity Fields
Required fields		
DBA Name ⓘ	lpreferal_businessInfo_dbaName_c	--Not Mapped--
Email ⓘ	lpreferal_controlOwner_email_c	--Not Mapped--
First Name ⓘ	lpreferal_controlOwner_firstName_c	--Not Mapped--
Last Name ⓘ	lpreferal_controlOwner_lastName_c	--Not Mapped--
Phone Number ⓘ	lpreferal_controlOwner_phoneNumber_c	--Not Mapped--
State ⓘ	lpreferal_controlOwner_state_c	--Not Mapped--
Email ⓘ	lpreferal_installationContact_email_c	--Not Mapped--
First Name ⓘ	lpreferal_installationContact_firstName_c	--Not Mapped--

You also have some optional fields.

Optional fields		
Current Generator(s) ⓘ	lpreferal_CurrentGenerators_c	--Not Mapped--
Number of Locations ⓘ	lpreferal_NumberofLocations_c	--Not Mapped--
Client Tracking ID ⓘ	lpreferal_Opp_clientTrackingId_c	--Not Mapped--
Primary ⓘ	lpreferal_Primary_c	--Not Mapped--
Product Interest ⓘ	lpreferal_ProductInterest_c	--Not Mapped--
Response_externalRefid ⓘ	lpreferal_Response_externalRefid_c	--Not Mapped--
SIC Code ⓘ	lpreferal_SICCode_c	--Not Mapped--
Additional Comments ⓘ	lpreferal_additionalInformation_comment_c	--Not Mapped--

And flex fields with the Save Mapping button on the bottom of the page.

Flex fields		
FLEX 1 ⓘ	Select Generic Flex Label ▼	--Not Mapped--
FLEX 2 ⓘ	Select Generic Flex Label ▼	--Not Mapped--
FLEX 3 ⓘ	Select Generic Flex Label ▼	--Not Mapped--
FLEX 4 ⓘ	Select Generic Flex Label ▼	--Not Mapped--
FLEX 5 ⓘ	Select Generic Flex Label ▼	--Not Mapped--

Save Mapping

Depending on the type of field you will be presented with different mapping fields.

For example, on Email you can have Prompt Required or Owner.Email.

- Prompt Required will let you have a Custom field on the Object Tab to fill the mapped field.
- Owner Email will autofill with the current User email (Setup -> User -> Edit Details -> Email Field).

Email ⓘ	lpreferal_controlOwner_email_c	Owner.Email
First Name ⓘ	lpreferal_controlOwner_firstName_c	--Not Mapped-- --Prompt (Required)-- Owner.Email

When the mapping is saved correctly you will be presented with a Success message.

Worldpay Label	Worldpay API	Success	Community Fields
The mapping has been submitted successfully.			
Required fields			
DBA Name ⓘ	lpreferal_businessInfo_dbaName_c		Opportunity Name
Email ⓘ	lpreferal_controlOwner_email_c		Owner.Email
First Name ⓘ	lpreferal_controlOwner_firstName_c		Owner.FirstName
Last Name ⓘ	lpreferal_controlOwner_lastName_c		Owner.LastName

Worldpay Success/Error Logs

On this tab, you will be presented with the record logs of sent Leads/Opportunities.

Worldpay Setup

Worldpay Env Configuration

WorldPay Success/Error Logs

Worldpay Field Mapping

WorldPay Success/Error Logs

All

4 items • Sorted by WorldPay ErrorLog Name • Filtered by All worldpay success/error logs • Updated a few seconds ago

	WorldPa...	Status	Code	Descripti...	Response	Created Date	
1	☐ EL-0000000	Suc	200	Success	[{"externalRefId":"9ae1355b-90c2-4c88-9202-30e69e4641b5","statusHistory":[{"statusSeqNumber":900,"detailStatus":"...}	5/27/2024, 11:57 ...	
2	☐ EL-0000001	Suc	200	Success	[{"externalRefId":"8169d05f-6269-459c-9821-6891d7edde0","statusHistory":[{"statusSeqNumber":900,"detailStatus":"...}	5/27/2024, 12:11 ...	
3	☐ EL-0000002	Suc	200	Success	[{"externalRefId":"a92ce47c-62b9-4901-b158-5097be1523fe","statusHistory":[{"statusSeqNumber":900,"detailStatus":"...}	5/27/2024, 2:01 PM	
4	☐ EL-0000003	Suc	200	Success	[{"externalRefId":"1a3b1034-363a-4da1-9ddc-f543b356649c","statusHistory":[{"statusSeqNumber":900,"detailStatus":"...}	5/27/2024, 2:02 PM	

Opening a record will show more details of Error/Success.

Worldpay Setup

Worldpay Env Configuration

WorldPay Success/Error Logs

Worldpay Field Mapping

WorldPay Success/Error Log

EL-0000000

Related

Details

WorldPay ErrorLog Name	Owner
EL-0000000	V2 Test
Code	
200	
Description	
Success	
Response	
[{"externalRefId":"9ae1355b-90c2-4c88-9202-30e69e4641b5","statusHistory":	
[{"statusSeqNumber":900,"detailStatus":"Lead	
Submitted","summaryStatus":"Submitted","statusCategory":"Lead","statusDateTime":"2024-0	
5-27 14:55:23"}]]	
Status	
Success	
leadId	
Lead	
externalRefId	
9ae1355b-90c2-4c88-9202-30e69e4641b5	
Created By	Last Modified By
V2 Test, 5/27/2024, 11:57 AM	V2 Test, 5/27/2024, 11:57 AM

Worldpay User Permission Set

In order for your Users to use the application, they need to have the Worldpay User Permission.



SETUP
Users

User
V2 Test

Permission Set Assignments (1)

Permission Set Assignments Activation Required (0)

Permission Set Group Assignments (0)

Permission Set License Assignments (0)

Lightning Data Purchase Assignments (0)

Personal Groups (0)

Public Group Membership (0)

Permission Set Assignments

Edit Assignments

Action	Permission Set Label	Date Assigned	Expires On
Del	Worldpay User	5/27/2024	

Email

edson.garcia@perfcient.com [Verified]

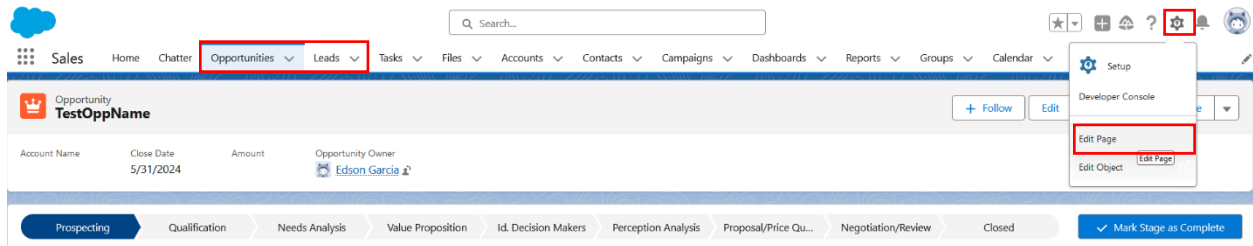
Profile

Standard User

*Make sure your user has access to the desired object (Lead/Opportunity).

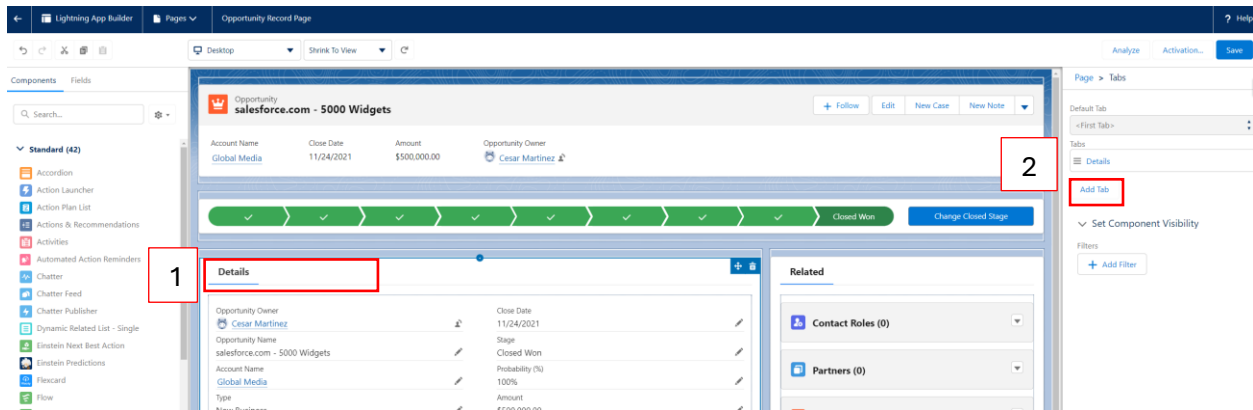
Set the object Custom Tab

You will need to set up the custom tab for the desired object, go to the object tab-> Create or open a record -> Gear icon -> Edit page.

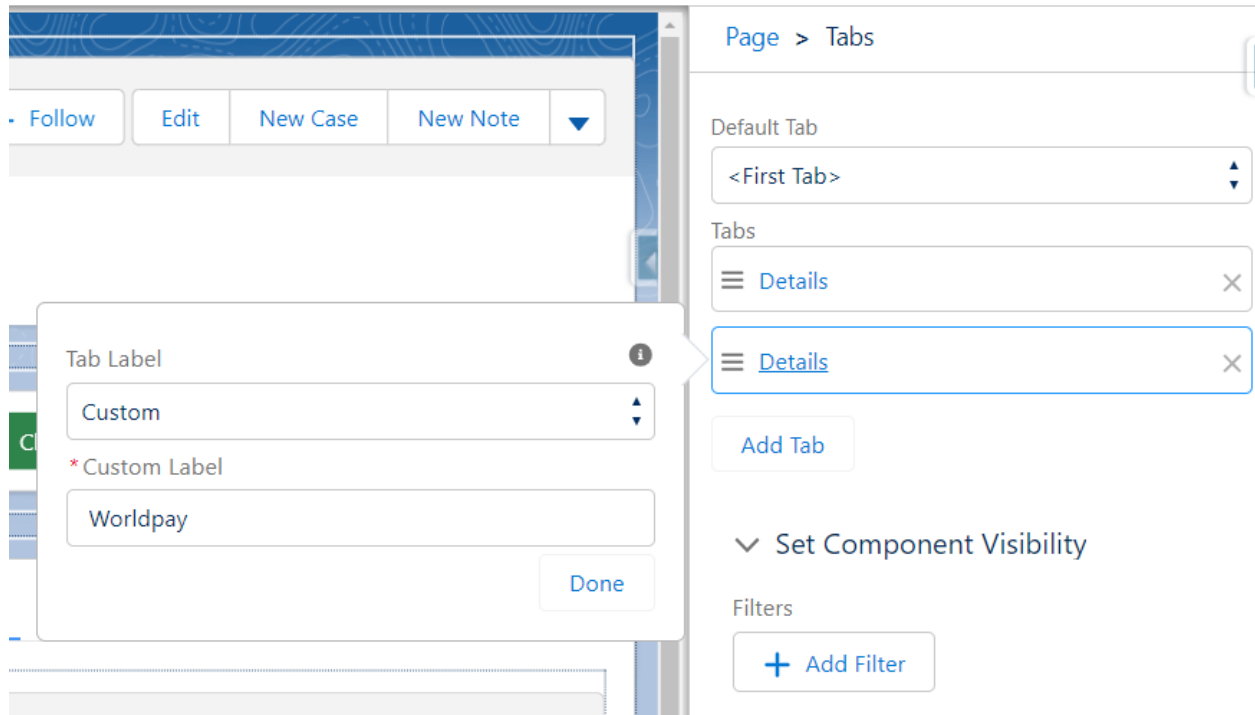


When editing the record page you will be presented with the Lightning App Builder.

1. Select the Tab on the center of the screen to add a new Tab special for the Worldpay Sub Tab.
2. Select Add Tab.



On the new tab added, select it then on Tab Label select Custom and add a Label.



With our new tab created, we select it and search on the Custom components on the left the lauchpadsubtab_LWC(for Lead) or lauchpadsubtabOpportunityLWC(for Opportunity) component drag and drop inside the new tab.

The screenshot displays the Lightning App Builder interface for the 'Opportunity Record Page'. The top navigation bar includes 'Lightning App Builder', 'Pages', and 'Opportunity Record Page'. Below the navigation bar, there are tabs for 'Desktop' and 'Shrink To View'. The left sidebar shows a 'Components' panel with a search bar and a list of components. The 'Custom - Managed (6)' section is expanded, showing a list of components. The 'lauchpadsubtabOpportunityLWC' component is highlighted with a red box. A red arrow points from this component to the 'Sales Agent Information' section of the 'Worldpay' details page. The 'Worldpay' details page shows a form with sections for 'Business Information', 'Control Owner Information', 'Installation Contact Information', and 'Sales Agent Information'. The 'Sales Agent Information' section contains fields for 'Email', 'First Name', 'Last Name', and 'Phone Number'. The 'Submit Opportunity to Worldpay' button is visible at the bottom of the form.

Lightning App Builder Pages Opportunity Record Page

Desktop Shrink To View

Components Fields

Search...

Related List - Single
Related List Quick Links
Related Lists
Related Record
Report Chart
Rich Text
runtime_cdpqueryWorkspaceCont...
Salesforce Anywhere Messages
Tableau Pulse
Tableau View
Tabs
Topics
Trending Topics
Visualforce

Custom (0)
No components available.

Custom - Managed (6)
GetLeadObjWithFields
GetOppObjWithFields
lauchpadsubtab_LWC
lauchpadsubtabOpportunityLWC
MappingSelector
WorldPay Admin Tab

Worldpay Details

Business Information
* DBA Name

Control Owner Information
* Email * First Name
* Last Name * Phone Number
* State --None--

Installation Contact Information
* Email * First Name
* Last Name

Sales Agent Information
* Email * First Name
* Last Name * Phone Number

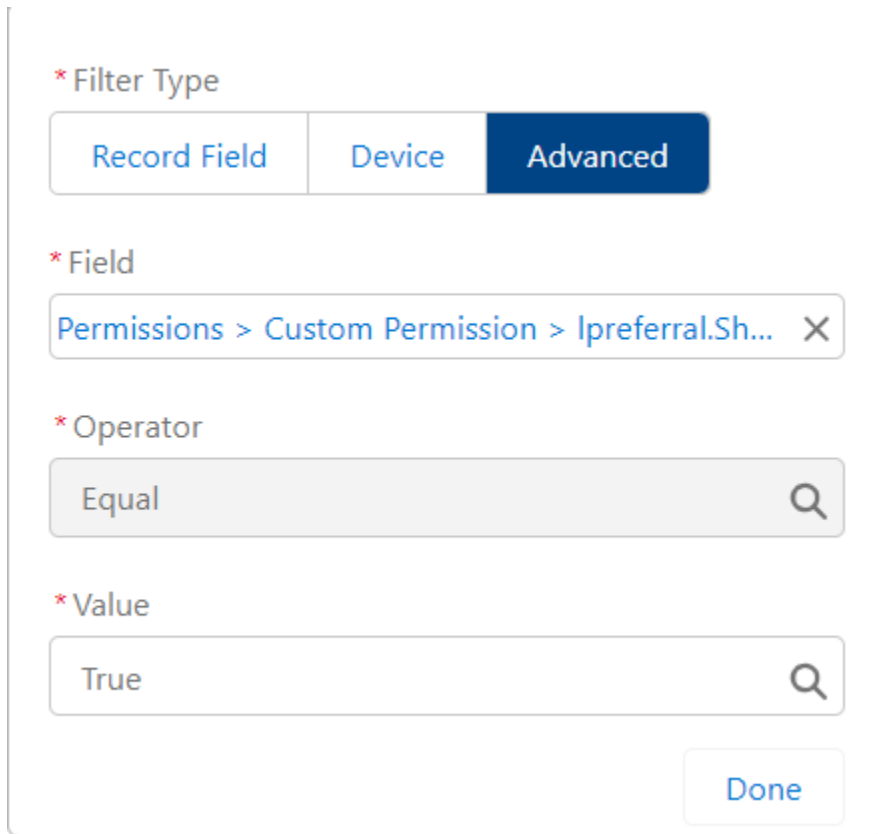
Cancel Save

Submit Opportunity to Worldpay

Select the new tab again and click Add Filter -> Advanced -> Field Select.

The screenshot displays a software interface with a top navigation bar containing buttons for 'Analyze', 'Activation...', and 'Save'. Below this, a 'Page > Tabs' section shows a 'Default Tab' set to '<First Tab>' and a list of tabs including 'Worldpay' and 'Details'. A modal window is open in the foreground, titled '* Filter Type', with three tabs: 'Record Field', 'Device', and 'Advanced' (highlighted with a red box and a '2' label). Inside the modal, the '* Field' section has a 'Select' button (highlighted with a red box and a '3' label). The '* Operator' section has a search input field, and the 'Value' section has a text input field. A 'Done' button is at the bottom right of the modal. To the right of the modal, a 'Set Content Visibility' section is partially visible, with a '1' label next to it. Below this, a 'Filters' section is highlighted with a red box, showing a list of filters with a 'New Filter' button and an 'Add Filter' button.

Now select Permissions -> Custom Permissions -> lpreferal.ShowWPSubtab



The image shows a configuration dialog box for permissions. It has a title bar and a close button (X) in the top right corner. The dialog is divided into four sections, each with a red asterisk indicating a required field:

- * Filter Type**: A horizontal tab bar with three tabs: "Record Field" (light blue), "Device" (light blue), and "Advanced" (dark blue, selected).
- * Field**: A text input field containing the breadcrumb path "Permissions > Custom Permission > lpreferal.Sh..." followed by a close button (X).
- * Operator**: A dropdown menu showing "Equal" with a magnifying glass icon on the right.
- * Value**: A text input field containing "True" with a magnifying glass icon on the right.

At the bottom right of the dialog is a "Done" button.

*This is for the tab to display only for users with the Worldpay User permission set.

Click Done.

You will be presented with a preview of the component, now you can save and activate the page.

Uninstall

To uninstall the application, go to your setup -> Installed Packages, search for the Worldpay Referral App and click uninstall.

Q

insta

▼ Apps

▼ Packaging

Installed Packages

▼ Feature Settings

▼ Analytics

▼ Apps

App Install History

Auto-Installed Apps

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

SETUP

Installed Packages

Installed Packages

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 custom 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
Uninstall	Worldpay Referral App	Worldpay	0.1 (Beta 65)	lpreferref	5/28/2024, 11:13 AM
	Description Worldpay Referral App				

Uninstalled Packages

No uninstalled package data archives

Select Yes, I want to uninstall and if you want a copy of the package data.

SETUP

Installed Packages

WorldPay Success/Error Log		Tab
Number of Merchant Locations	Lead	Custom Field
Goods or Services Sold	Lead	Custom Field
Legal Business Name	Lead	Custom Field
Business Type	Lead	Custom Field
Promot Required	Worldpay Field Mapping	Custom Field
Promot Optional	Worldpay Field Mapping	Custom Field
Mapping Selected	Worldpay Field Mapping	Custom Field
Lead Field API	Worldpay Field Mapping	Custom Field
Status	WorldPay Success/Error Log	Custom Field
Worldpay Field API	Worldpay Field Mapping	Custom Field
Section Name	Worldpay Field Mapping	Custom Field
Required	Worldpay Field Mapping	Custom Field
Required	Worldpay Field Mapping Opp	Custom Field
Promot Required	Worldpay Field Mapping Opp	Custom Field
Promot Optional	Worldpay Field Mapping Opp	Custom Field
Opportunity Field API	Worldpay Field Mapping Opp	Custom Field
FlexField	Worldpay Field Mapping	Custom Field
FlexField Label	Worldpay Field Mapping	Custom Field
Worldpay Field API	Worldpay Field Mapping Opp	Custom Field
Section Name	Worldpay Field Mapping Opp	Custom Field

Custom Object Data

Custom Object	Records (Approximate)
LeadSystemFields	0
WorldpayEnvConfigCM	0
Status Comments History	0
WorldPay Success/Error Log	0
Worldpay Field Mapping	0
Worldpay Field Mapping Opp	0
OppSystemFields	0

☐ Save a copy of this package's data for 48 hours after uninstall

☒ Do not save a copy of this package's data after uninstall

☒ Yes, I want to uninstall this package and permanently delete all associated components

Uninstall

You may encounter errors when uninstalling, you need to make sure all the components are deleted.

- Metadata Records (Worldpay Field Mapping / Worldpay Field Mapping Opp)

Custom Metadata Types										
Worldpay Field Mapping Opp										
Action	Label	Mapping Selected	Opportunity Field API	Worldpay Field API	Required	Prompt Optional	Prompt Required	FlexField	FlexField Label	Section Name
Del	businessinfo_dbaName	✓		!preferral__businessinfo_dbaName__c	✓	☐	✓	☐		Business Information
Del	controlOwner_email	✓		!preferral__controlOwner_email__c	✓	☐	✓	☐		Control Owner Information
Del	controlOwner_firstName	✓		!preferral__controlOwner_firstName__c	✓	☐	✓	☐		Control Owner Information
Del	controlOwner_lastName	✓		!preferral__controlOwner_lastName__c	✓	☐	✓	☐		Control Owner Information
Del	controlOwner_phoneNumber	✓		!preferral__controlOwner_phoneNumber__c	✓	☐	✓	☐		Control Owner Information
Del	controlOwner_state	✓		!preferral__controlOwner_state__c	✓	☐	✓	☐		Control Owner Information
Del	salesAgent_email	✓		!preferral__salesAgent_email__c	✓	☐	✓	☐		Sales Agent Information
Del	salesAgent_firstName	✓		!preferral__salesAgent_firstName__c	✓	☐	✓	☐		Sales Agent Information
Del	salesAgent_lastName	✓		!preferral__salesAgent_lastName__c	✓	☐	✓	☐		Sales Agent Information
Del	salesAgent_phoneNumber	✓		!preferral__salesAgent_phoneNumber__c	✓	☐	✓	☐		Sales Agent Information

- Remove the LWC component from the Lightning Page.

Lightning App Builder | Pages | Opportunity Record Page

Desktop | Shrink To View

Components | Fields

Standard (42)

- Accordion
- Action Launcher
- Action Plan List
- Actions & Recommendations
- Activities
- Automated Action Reminders
- Chatter
- Chatter Feed
- Chatter Publisher
- Dynamic Related List - Single
- Einstein Next Best Action
- Einstein Predictions
- Flexcard
- Flow
- Flow Orchestration Work Guide
- Highlights Panel
- Launchpad
- List View
- OmniScript
- OmniScript for Experience Cloud
- Path
- Quip Associated Documents
- Quip Document

Details | Worldpay

Business Information

* DBA Name

Control Owner Information

* Email

* First Name

* Last Name

* Phone Number

* State

--None--

Sales Agent Information

* Email

* First Name

* Last Name

* Phone Number

Cancel Save

Submit Opportunity to Worldpay

*After removing all the items, try uninstalling again.