

# Blockchain Payments for Salesforce

## Web3 Enabler

Installation and Admin Guide V2.3



# Overview

Web3 Enabler for Salesforce enables Sales Cloud and Service Cloud users to accept payments in popular Cryptocurrencies and Stablecoin cryptocurrencies. Blockchain Payments supports the following EVM Networks: Ethereum, Polygon, Arbitrum Optimism, and BASE networks, and the following UTXO Networks: Bitcoin, Doge, Litecoin, as well as the XRP Ledger Network.

Web3 Enabler is secure by design. Neither your Salesforce Org nor Web3 Enabler has access to users' private keys. Public keys are connected using secure landing pages, made safer with third party tools like Wallet Connect and Auth0. We only use your UTXO xpub to derive and monitor transactions, or EVM Wallet addresses for monitoring transactions.

Your users do not need to be Web3 knowledgeable to accept cryptocurrency payments. With a few button clicks, they can invite your clients to connect their wallets and begin sending payments. Cryptocurrency standards like QR codes are natively supported. We also provide easy to reference URL fields for inclusion in your existing workflow. You can add a Payment Link to your existing Invoices and begin accepting payments immediately. Clients just need to connect their wallet through our secure URL to provide their Wallet Address, and we track all the payments.

We urge Salesforce Administrators to read through this entire document at least twice. If you are new to Web3, some of the details may be unfamiliar to you. If you are experienced with Web3, you may find some of the simplifications we make in the interface shocking. We have focused on making the process as simple as possible.

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# Quick Start Guide

For security reasons, we recommend a limited access Integration User with Web3 Enabler Integration Permissions. Because of the sensitive nature of Blockchain Financial Transactions, a clear paper trail of this user is recommended. We recommend using an Integration User, but a Standard User with Admin Profile and the Integration Permission set will also work.

## Installation Instructions (Quick Start):

Before installation, decide whether or not your organization is going to be multi-currency aware. If you are a single currency organization, you will likely want to create policies around which crypto assets you accept. If you are a multi-currency organization, you will likely want to accept stable coins from currencies you accept. See “Best Practices” below.

Please note, the precise instructions are also available in the Web3 Enabler Setup Application, under Post-Install Manual Steps.

The Integration User needs the following Permissions:

- Salesforce Integration or Full Salesforce License
- Two Custom Permission Sets that you will create
- The Integration User Permission Set
- Authorization via the “Authorize my Org” link on the Web3 Enabler Setup App

Web3 Enabler includes the permission sets necessary for most operations. There are a few permissions that cannot be added by developers, so we will walk through the installation.

The permission in question are authorization to the ConnectedApp, that allows the communication, and access to the Standard Object Account.

Step by step instructions are as follows:

Enter Setup, Search for Permission Sets and create 2 following permission sets.

Create a new Permission Set named 'Web3 Enabler Integration Access' without license.

Choose 'Assigned Connected App' -> Add 'MuKn Web3 CA'.

Create a new Permission Set named 'Web3 Enabler Object Access' with license 'Salesforce API Integration'.

Choose 'Object Settings' -> Choose 'Accounts' -> Edit -> View All.

Step By Step Instructions:

1. Install the Package from the AppExchange available to All User or Selected Group of Users
2. Grant the Salesforce Admin that is configuring Web3 Enabler the Web3 Enabler Admin Permission Set.
3. Create a User for Integration
  - a. Create a Two Permission Sets - The permissions grant access that we cannot add as developers. This includes the Connected App used for Integration, and View Access to the Accounts Object.

- i. Permission Set 1:
    - 1. Name: Web3 Enabler Integration Access
    - 2. License Required: None
    - 3. Permissions: 'Assigned Connected Apps' -> MuKn Web3 CA
  - ii. Permission Set 2:
    - 1. Name: Web3 Enabler Object Access
    - 2. License Required: Salesforce API Integration
    - 3. Permissions: 'Object Settings' -> Choose 'Accounts' -> Edit -> View All
- b. Create a Salesforce Integration User
  - i. Use an email you can monitor
  - ii. Salesforce License: Salesforce Integration
  - iii. Salesforce Profile: Salesforce API Only System Integrations
  - iv. Grant a Web3 Enabler License to the Integration User
  - v. Assign the Following Permissions Set:
  - vi. **Web3 Enabler Integration (Managed)**
  - vii. Web3 Enabler Integration Access
  - viii. Web3 Enabler Object Access
- 4. Authorize and Connect the App to Your Org
  - a. Make sure you have the User/Password from the User Created in Step Two.
  - b. Go to the "Web3 Enabler Setup Tab" and click Authorize My Org (we recommend that you right-click and use an Incognito / Private Browser). Login and Authorize.
  - c. After Authorization, refresh the Web3 Enabler Setup Tab, you should see everything.

## Usage Settings (Quick Start):

Any users that need access to Web3 Enabler should have a Web3 Enabler license. You can assign this in the Salesforce Setup "Installed Packages Screen".

Users will also need appropriate permissions based on their use cases.

Permission Levels: User, Admin

User level settings: Web3 Enabler User (Managed) Permissions grant access to the tools a typical Salesforce Salesperson or Customer Service Representative needs to manage Web3 exchanges. They can access the QR Codes, create the Account Wallets for connection and otherwise enable sales to occur.

Admin level Settings: Web3 Enabler Admin (Managed) Permissions. This user should be familiar with Web3 concepts like blockchains, tokens and contracts. The Admin User can edit any of these settings. If nobody in your organization has this knowledge, the defaults are probably sufficient for your needs.

# Best Practices (Cryptocurrencies)

As you and your organization become more comfortable with the world of digital assets, you may branch out. However, for most organizations new to accepting cryptocurrencies, a few simple operations will alleviate risk and simplicity.

## Understand the Basics of Public Key Encryption

Public key encryption relies on a series of mathematical equations that connects a private and public key for an account.. Anyone with access to your public key can send a message to you and only you can decode it. You can “digitally sign” a message with your private key, and anyone with your public key can verify it. This key pairing is among the foundations of cryptocurrencies.

As a result, your organization can publish its public key to receive payments. However, only the possessor of the private key can authorize the “spending” of those coins, by sending a signed message to the network. In common usage, the private key is managed by the “wallet holder”.

Web3 Enabler only stores public keys. For EVM networks, this is the public key to the “Account” you are using with Web3 Enabler. For UTXO networks, this is the “extended public key” that creates transactional addresses. In all circumstances, Web3 Enabler relies upon publicly available information to report transactions. Only the “wallet holder” with the private keys can “spend those coins” - including transferring them to a fiat off-ramp.

## Create Policies around Wallet Access

Whoever controls the private keys controls the coins. You should generally have at least two people with access to the wallet to avoid losing your coins. You should decide how much crypto exposure you want to have, and convert to fiat when your coins on hand exceed it. Web3 Enabler uses your public key only, and does not have access to your coins.

## Installation - Step by Step

1. Choose your integration user
  - a. Recommended case - a dedicated Web3 Integration User
    - i. User License: Salesforce Integration
    - ii. Profile: Salesforce API Only System Integration
    - iii. Permission Set: Web3 Enabler Integration (Managed)
    - iv. Enter Setup, Search for Permission Sets and create 2 following permission sets:
      1. Create a new Permission Set named 'Web3 Enabler Connected App Access'.
        - a. Choose 'Assigned Connected App', Add 'MuKn Web3 CA'.

2. Create a new Permission Set named 'Web3 Enabler Accounts Access' with license 'Salesforce API Integration'.
  - a. Choose Object Settings, Accounts, Check: View All, Modify All.
3. Assign to the integration user.
  - b. Alternative - Use a normal Salesforce User, grant the Web3 Enabler Admin (Managed) Permission. Grant Access to that user to the Connected App (via Profile or Permission Set).
2. In App Selection, choose "Web3 Enabler Setup".
3. Authorize my Organization - It is recommended that you use an Incognito/Private Browser.
4. As the User from Step 1, Login, authenticating your user information.

## Installation Screenshots

Screenshot 1: Go to App Manager in Setup

The screenshot shows the Salesforce Setup interface for the Lightning Experience App Manager. The page title is "Lightning Experience App Manager" and it includes buttons for "New Lightning App" and "New Connected App". A toggle switch for "Enable App Cloning" is currently disabled. Below this is a table listing 16 installed apps, sorted by name. The "MuKn Web3 CA" app is highlighted in the table.

App Name	Developer Name	Description	Last Modified	App Type	Visible
1 All Tabs	AllTabSet		5/24/2023, 12:35 PM	Classic	
2 App Launcher	AppLauncher	App Launcher tabs	5/24/2023, 12:35 PM	Classic	✓
3 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for you...	5/24/2023, 12:35 PM	Lightning	✓
4 Community	Community	Salesforce CRM Communities	5/24/2023, 12:35 PM	Classic	✓
5 Content	Content	Salesforce CRM Content	5/24/2023, 12:35 PM	Classic	✓
6 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	5/24/2023, 12:35 PM	Lightning	✓
7 Marketing	Marketing	Best-in-class on-demand marketing automation	5/24/2023, 12:35 PM	Classic	✓
8 MuKn Web3 CA	MuKnWeb3CA		5/24/2023, 12:39 P...	Connected	
9 Platform	Platform	The fundamental Lightning Platform	5/24/2023, 12:35 PM	Classic	

Screenshot 2: Choose Manage for MuKn Web3 CA

Lightning Experience App Manager

Clone Apps(Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter '23 release notes](#)

Enable App Cloning  Disabled

16 items - Sorted by App Name - Filtered by All appmenuitems - TabSet Type

App Name ↑	Developer Name	Description	Last Modified ...	App ...	Vi...
1 All Tabs	AllTabSet		5/24/2023, 12:35 PM	Classic	
2 App Launcher	AppLauncher	App Launcher tabs	5/24/2023, 12:35 PM	Classic	✓
3 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for you...	5/24/2023, 12:35 PM	Lightning	✓
4 Community	Community	Salesforce CRM Communities	5/24/2023, 12:35 PM	Classic	✓
5 Content	Content	Salesforce CRM Content	5/24/2023, 12:35 PM	Classic	✓
6 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	5/24/2023, 12:35 PM	Lightning	✓
7 Marketing	Marketing	Best-in-class on-demand marketing automation	5/24/2023, 12:35 PM	Classic	✓
8 MuKn Web3 CA	MuKnWeb3CA		5/24/2023, 12:39 P...	Connected	
9 Platform	Platform	The fundamental Lightning Platform	5/24/2023, 12:35 PM	Classic	
10 Sales	Sales	The world's most popular sales force automation (SFA) sol...	5/24/2023, 12:35 PM	Classic	
11 Sales	LightningSales	Manage your sales process with accounts, leads, opportu...	5/24/2023, 12:37 PM	Lightning	
12 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles a...	5/24/2023, 12:35 PM	Classic	

Screenshot 3: Go to Web3 Enabler Setup, Authorize in Private / Incognito Window

Web3 Enabler Setup

Web3 Enabler Setup

**Web3 Enabler Setup**

From this screen Web3 Enabler for Salesforce is Connected to the Mutual Knowledge Web3 Enabler System  
Salesforce Organization Id: **00D5200000aF6n**

**Mutual Knowledge Web3 Information:**

**Authorization Status**

Organization Information

Organization Id  
Org Id  
Organization URL  
Authorized: false

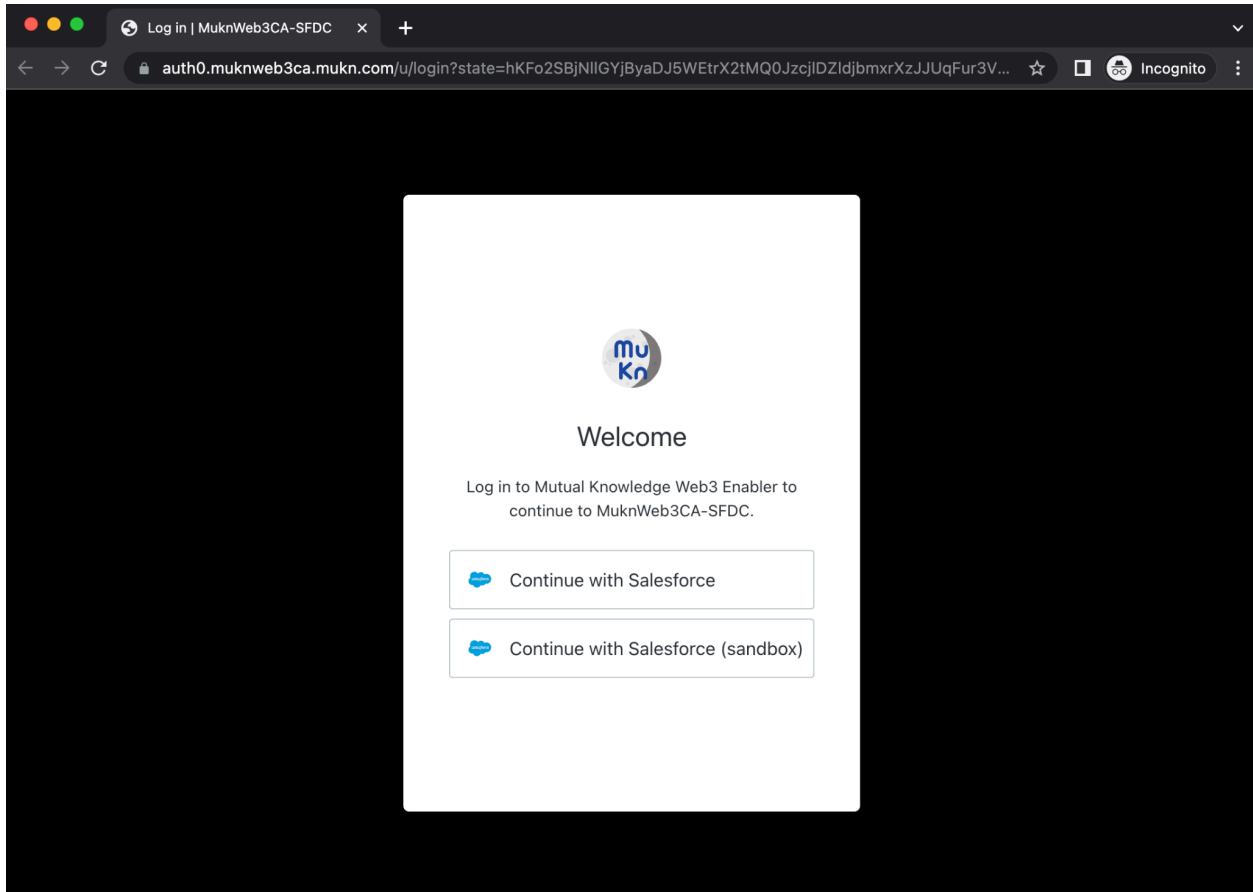
Connect to MuKn Web3 Enabler

Authorize M...

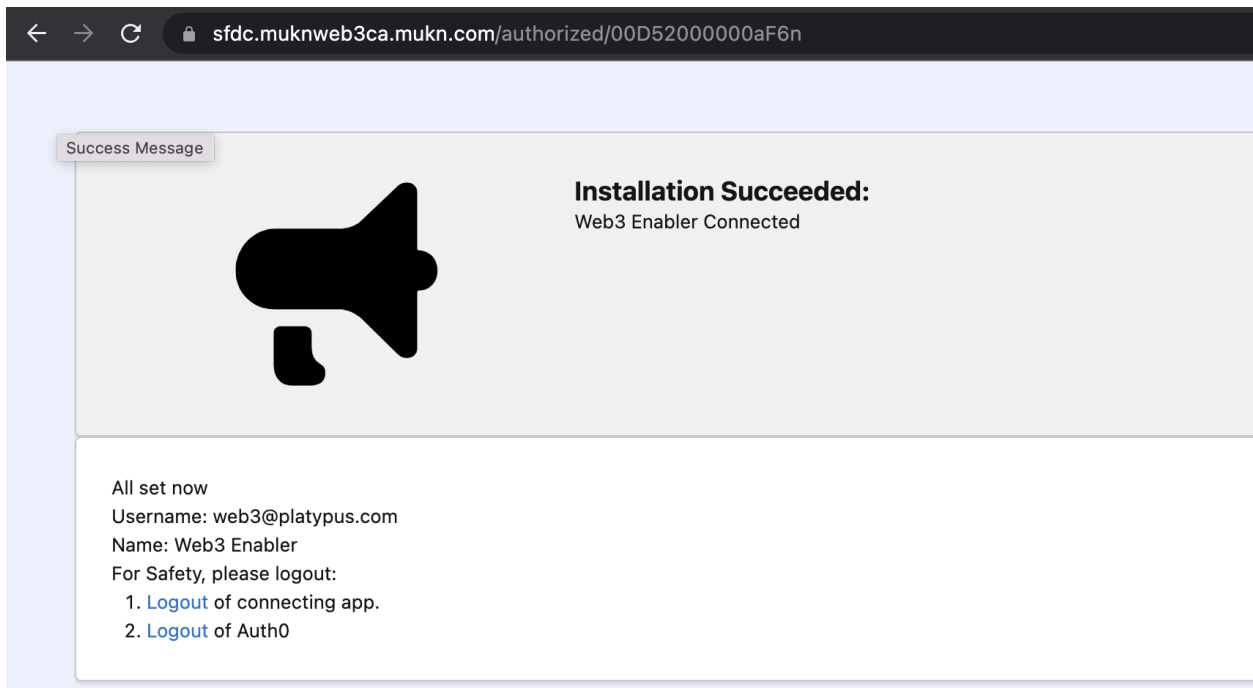
- Open Link in New Tab
- Open Link in New Window
- Open Link in Incognito Window

Screenshot 4: Login with either Standard or Sandbox Login





Screenshot 5: Grant any requested access and finish



Close the Private/Incognito browser. Otherwise, make sure to Logout of the Connected App.

## Screenshot 6: Refresh of the Web3 Enabler Setup to see the settings

**Web3 Enabler Setup**

From this screen Web3 Enabler for Salesforce is Connected to the Mutual Knowledge Web3 Enabler System  
Salesforce Organization Id: **00D5200000aF6n**

**Mutual Knowledge Web3 Information:**

Authorization Status	
Organization Information	
Organization Id	89c13700-599f-4294-b513-32f1a0f7c3ff
Org Id	00D5200000aF6n
Organization URL	https://productivity-platypus-288-dev-ed.scratch.my.salesforce.com
Authorized	true
Connect to MuKn Web3 Enabler	
<a href="#">Re-authorize My Org</a>	
<a href="#">Verify My Org</a>	

## Permissions and Use Cases

The Web3 Enabler Package features four levels of permissions:

- Web3 Enabler Integration: Write Access to Transaction Logs
- Web3 Enabler Admin: Used by Administrators to add/edit/automate processes around Asset Tokens, including changing Conversion Rates
- Web3 Enabler Accountant: This Permission Set allows designated users to View all Transactions. It does not allow them to update Conversion Rates, by default only the Admin User can do that.
- Web3 Enabler User: This Permission allows normal users access to the appropriate fields/objects for their records.

## Integration and Admin

The Web3 Enabler Integration Permission Set is designed for a dedicated Salesforce Integration User, this is the recommended approach.

If you prefer to use a standard user for integration, the Web3 Enabler Integration permission is fine for a dedicated user. More commonly, a Web3 Enabler Admin permission is appropriate for an Administrator Integration user.

## Usage and Reporting

Most users will just need the Web3 Enabler User permission, this allows normal usage and permissions to the system. If you have the need for a dedicated Accounting Resource with unlimited view access to the Blockchain Data but not necessarily full access to the underlying Accounts, the Web3 Enabler Accountant enables you to grant that permission.

Depending on data needed, a Platform or Full license is required for the Accountant User.

## Configuring a Organization Wallet

Create a new Org Wallet. Use an easy to remember name that will help you track your wallet. If you would like to test the functionality with TestNet transactions, then enable Test Networks. Remember to disable this when you are done testing.


If Test Networks are enabled, transactions from the supported Test Networks will show up in the Inbound Blockchain Transactions and Outbound Blockchain Transactions. They will not have a transaction value, but they will risk causing confusion.

After you are comfortable with your setup, turn off Test Networks for the Wallet to stop these transactions from reaching your Salesforce Install.

### New Org Wallet: EVM (Ethereum)

**Information**

\* Wallet Name ↶  
Company Meta Mask Wallet

Owner  
 User User

\* Preferred Networks

Available		Chosen
Polygon	▶	Ethereum
Optimism	◀	
Arbitrum		

Test Networks ↶

[Cancel](#) [Save & New](#) [Save](#)

After you create the Wallet, you will need to connect it.

Inbound Blockchain Transactions

## Company Meta Mask Wallet

Wallet Name	Company Meta Mask Wallet	Owner	User User
Preferred Networks	Ethereum		
Test Networks	<input checked="" type="checkbox"/>		
Wallet Address ⓘ	<a href="#">Connect</a>		
QR Payment URL			
Created By	User User, 5/24/2023, 2:03 PM	Last Modified By	User User, 5/24/2023, 2:03 PM

If you have your wallet in your browser, just click on the Connect Link. If you are planning to use a Phone based or other external wallet, it is recommended that you right click on Connect and choose Incognito or Private Browser.

From there, choose Sign In With Ethereum and the appropriate connector.

Upon connection, you will be asked to "Save Wallet Address".

**Wallet Info:**  
Please verify your Wallet Address below and choose "Save Wallet Address." That will complete your wallet connection.

Wallet Address:

0x79c7612dB2b5C1610fe9530b1EAED0Be66E718c0

[Save Wallet Address](#)

Which will update Salesforce and take you to the Success Screen.



## Organization Wallet Connected

Thank you for using Web3 Enabler

You have successfully connected your wallet!

Salesforce Org: 00D5200000aF6n

Salesforce RecordId: a045200000AaW49

Public Wallet Address: 0x79c7612dB2b5C1610fe9530b1EAED0Be66E718c0

For Safety, please logout:

1. [Logout](#) of connecting app.
2. [Logout](#) of Auth0

Refresh your Salesforce Page and your Wallet Address will now be visible and your QR Payment link will be available.

## Install Web3 Enabler Blockchain Payments

Install the Blockchain Payments application for your Salesforce Org to start setting up and using the app.

1. Open Salesforce App Launcher.

Sandbox: NilesDev1 | Log out

1. Click

2. Click

App Launcher

Search apps and items...

Apps

- MuKn Console
- Digital Experiences
- Milestones PM Plus - Setup
- License Management App
- Environment Hub
- Service Console
- Project Management Console

View All

There's nothing in My Open CRM Tasks yet. When records are added to this list view, you'll see them here.

Key Deals - Recent Opportunities

No deals yet. Select another filter or check back later.

All Open Cases

All Open Cases

0 items, sorted by Case Number

Filtered by Closed

There's nothing in All Open Cases yet. When records are added to this list view, you'll see them here.

Assistant

Nothing needs your attention right now. Check back later.

Today's Events

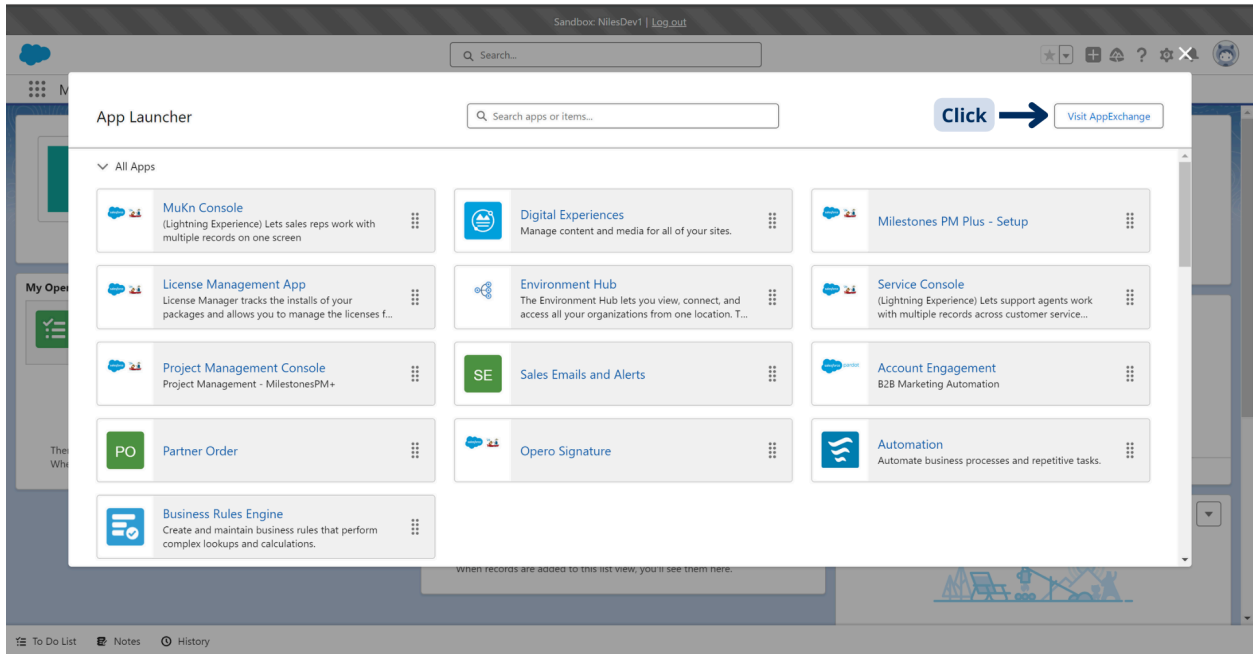
Looks like you're free and clear the rest of the day.

View Calendar

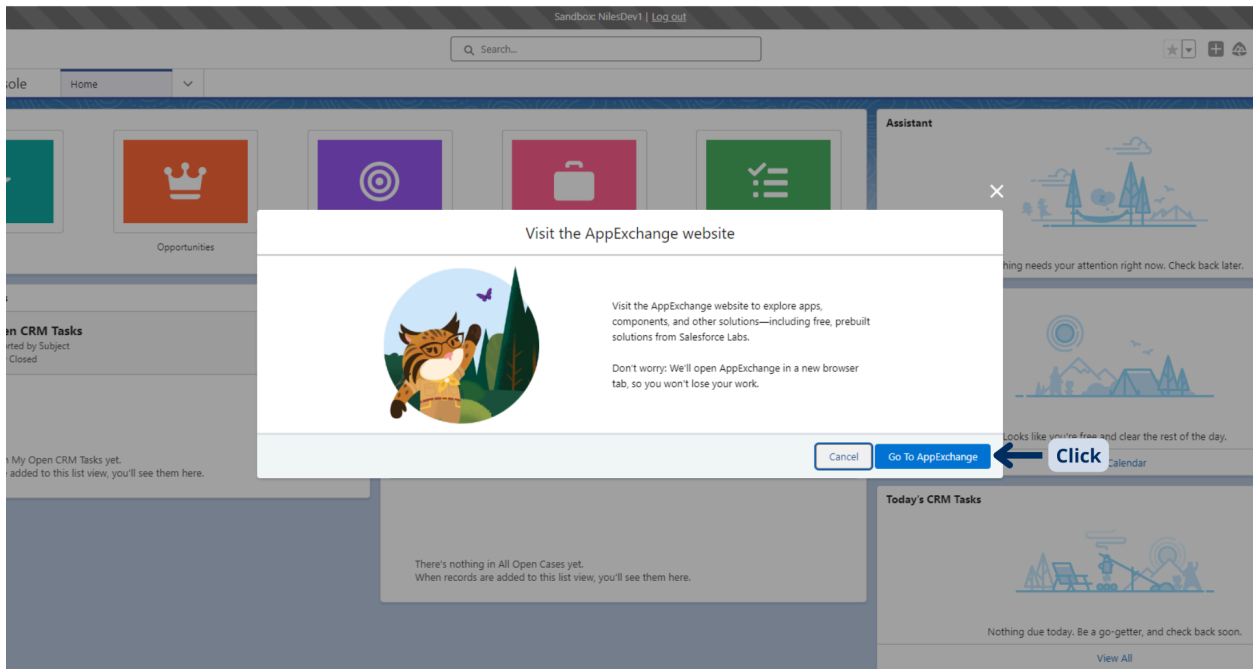
Today's CRM Tasks

To Do List | Notes | History

## 2. Click Visit AppExchange.



## 3. Click Go To AppExchange.



#### 4. Search for Blockchain Payments on Salesforce AppExchange.

AppExchange Home Explore Collections Consultants Learn

Search Blockchain Payments Click

Top Categories: Finance, Human Resources, Enterprise Resource Planning, Sales, Customer Service, IT & Admin, Marketing, Integration, Salesforce Labs, Analytics

**Make work easier and faster with proven productivity apps.**

Extend Salesforce with pre-built, data-driven apps that help you streamline workflows, harmonize data, and increase cost-savings.

Explore The Apps

#### 5. Select Blockchain Payments application on Salesforce AppExchange.

AppExchange Home Explore Collections Consultants Learn

Search Blockchain Payments

Results for "Blockchain Payments"

Apps & Solutions (7) Consultants (0)

Search filters...

**Pricing**

- Free
- Freemium
- Paid
- Paid Add-On Required
- Discounts for Nonprofits

**Rating**

- ★★★★★ & Up
- ★★★★☆ & Up
- ★★★☆☆ & Up
- ★★☆☆☆ & Up
- ★☆☆☆☆ & Up
- Unrated

Sort by Relevance

**Blockchain Payments**  
Web3 Enabler, Inc.  
★★★★★ 5 (2)  
Web3 Enabler's Blockchain Payments integrates blockchain transactions with your Salesforce CRM. Enable your Sales and Support representatives to easily and safely receive...

Sales Accounting

**Kripto — The Bitcoin Enterprise ...**  
Bonakodo Limited  
★★★★★ 4.5 (4)  
The answer to your cryptocurrency strategy in 2023. Receive, send, analyze, and own your Bitcoins by using this fully native Salesforce Platform app!

Quotes & Orders Finance

**Yacht Broker CRM on Salesforce...**  
Yachtchain UAB  
No Ratings  
Yacht Broker CRM on Salesforce simplifies workflows of yacht brokers and service providers through its intuitive interface and streamlined processes. Brokers can manage...

Sales Quotes & Orders

**Blockchain Adapter for Salesf...**  
ObjectFrontier, Inc.  
No Ratings  
There is an increasing demand for the applications of Blockchain in Enterprises. Our adapter is an accelerator that enables you to integrate your Salesforce Solutions with...

Integration

6. Click Get It Now.

AppExchange Home Explore Collections Consultants Learn Sign Up Log In

Search AppExchange

### Blockchain Payments

By Web3 Enabler, Inc.  
Natively accept cryptocurrencies in Salesforce- faster international sales.  
Salesforce App ★★★★★ 5 Average Rating (2 Reviews)

**Click** → **Get It Now** ❤️

Starting at **\$399** USD/5 Users/month  
Discounts available for nonprofits  
[Pricing Details](#)

**Industries**  
Engineering, Construction, & Real Estate  
Financial Services Healthcare & Life Sciences

**Business Need**  
Sales Accounting Payments Processing

**Requires**  
None

**Compatible With**  
Sales Cloud Service Cloud

[More Details](#)

Web3 Enabler's Blockchain Payments integrates blockchain transactions with your Salesforce CRM. Enable your Sales and Support representatives to easily and safely receive stablecoin and cryptocurrency payments from your customers via popular blockchains

**Watch Demo**

**Company Meta Mask Wallet**

Wallet Name	Company Meta Mask Wallet	Owner	User User
Preferred Network	Ethereum		
Test Networks			
Wallet Address			
Contact			
QR Payment URL			
Created By	User User, 5/24/2023, 7:03 PM	Last Modified By	User User, 5/24/2023, 7:03 PM

Create an entry for your company, one click connection.

7. Click Log In.

LET'S GET STARTED

Log In with **Trailblazer.me** OR Don't have an account?

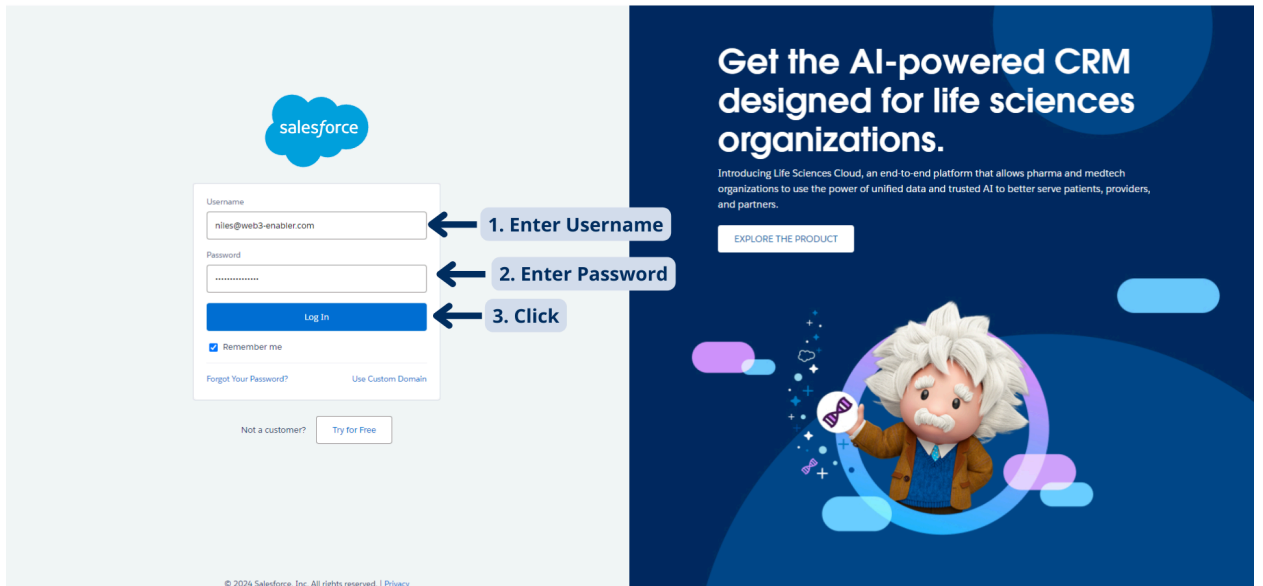
**Click** → **Log In** OR **Continue as Guest**

What's Trailblazer.me?

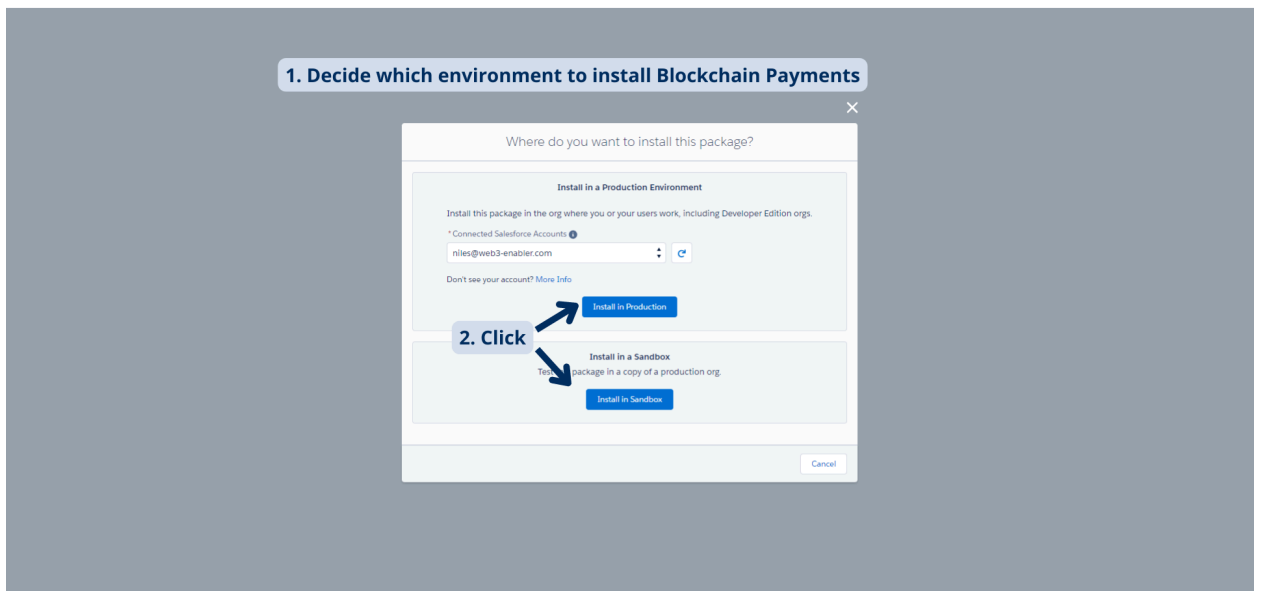
By submitting this request, you agree to share your information with Salesforce and the provider of this listing, Web3 Enabler, Inc. Listing: Blockchain Payments



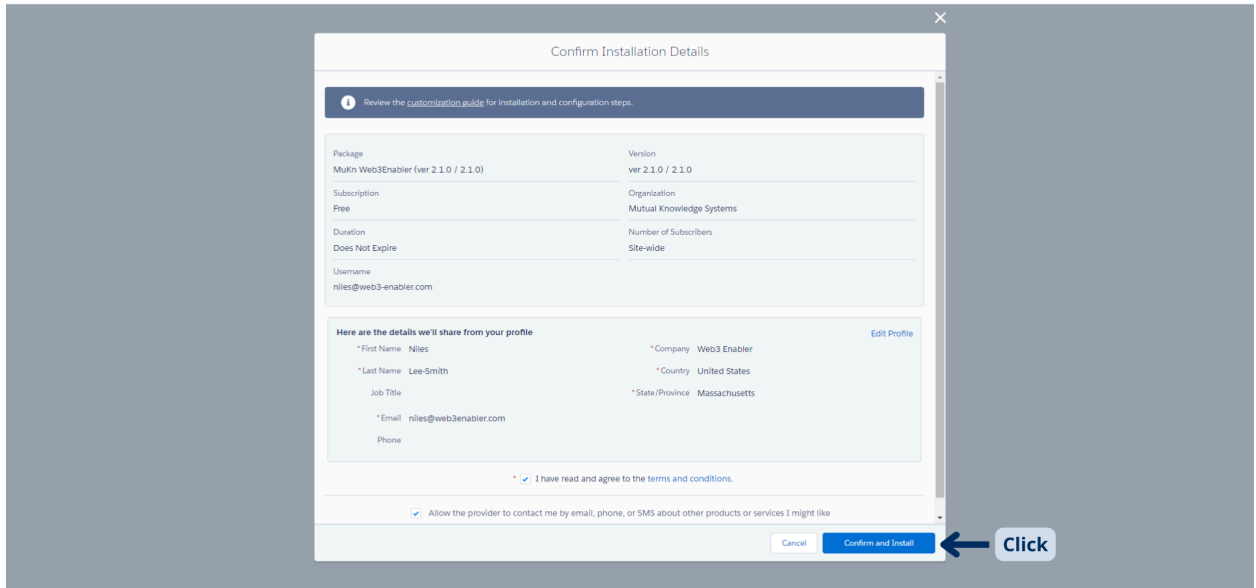
8. Log in to your Salesforce account.



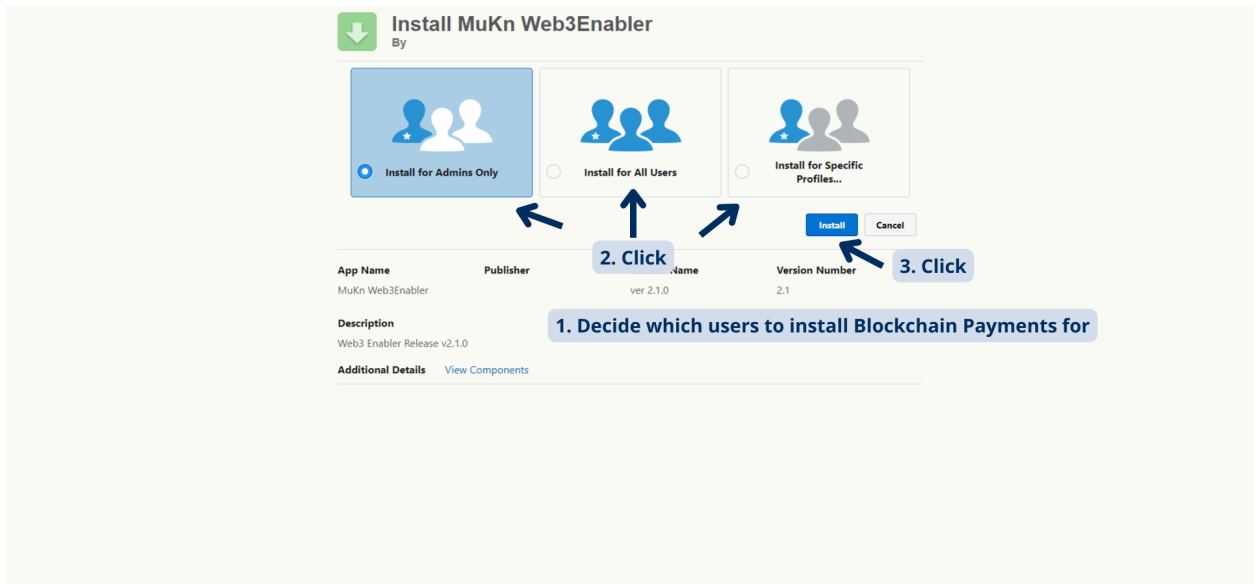
9. Click Install in Production or Install in Sandbox.



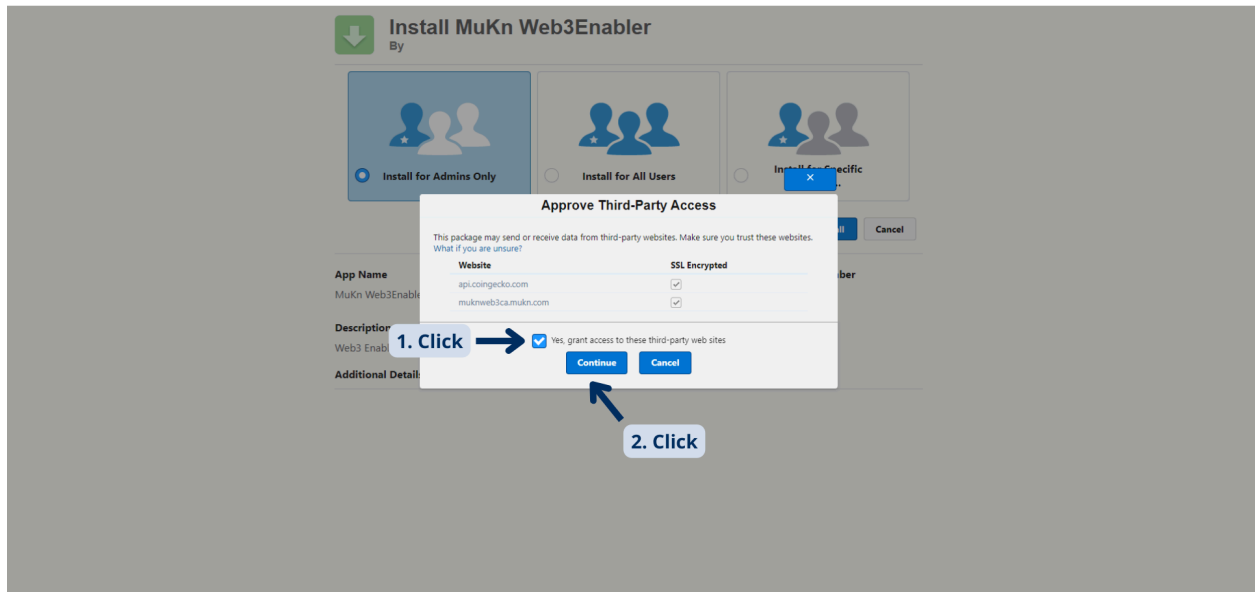
10. Click Confirm and Install.



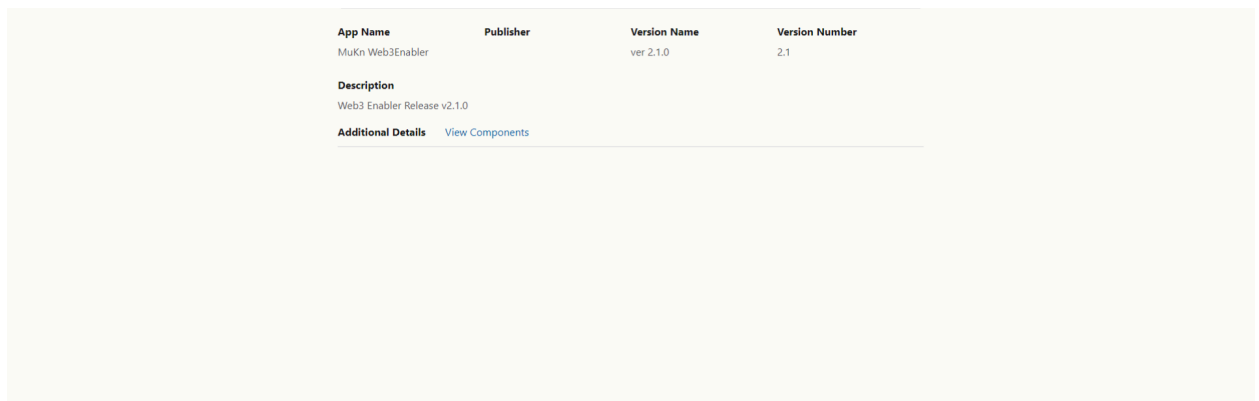
11. Click Install.



12. Accept and click Continue.



13. Verify installation of Blockchain Payments has started.



## 14. Go to Salesforce and click Setup.

The screenshot shows the Salesforce Home dashboard. At the top right, a blue arrow labeled "1. Click" points to the gear icon (Setup). A second blue arrow labeled "2. Click" points to the "Setup" option in the dropdown menu that appears. The dashboard includes sections for Leads, Opportunities, Campaigns, Cases, CRM Tasks, My Open CRM Tasks, Key Deals - Recent Opportunities, All Open Cases, Assistant, Today's Events, and Today's CRM Tasks.

## 15. Click Installed Packages.

The screenshot shows the Salesforce Setup page. On the left sidebar, under "PLATFORM TOOLS", the "Installed Packages" option is selected with a blue arrow labeled "Click". The main content area displays the "SETUP Home" page with three featured cards: "Your Account", "Einstein Prediction Builder", and "Mobile Publisher". Below these cards is a "Most Recently Used" section with a table of items.

NAME	TYPE	OBJECT
<a href="#">Google Drive</a>	External Data Source	
<a href="#">Niles Lee-Smith</a>	User	
<a href="#">Cold outreach 1</a>	Email Template	

## 16. Verify Blockchain Payments has been installed and go to Web3 Enabler Setup.

The screenshot shows the Salesforce interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. A search bar is present. Below the navigation bar, there's an 'App Launcher' dropdown menu on the left, and a table of 'Installed Packages' on the right. The 'App Launcher' menu is open, showing a search bar and a list of apps. An arrow labeled '2. Click' points to the 'Setup' icon in the navigation bar. Another arrow labeled '3. Click' points to 'Web3 Enabler Setup' in the App Launcher. The 'Installed Packages' table has a title '1. Verify Web3 Enabler Blockchain Payments page installation'. The table lists various installed packages with columns for Name, Version, Package ID, Installed Date, and Status. The 'Web3 Enabler Blockchain Payments' package is highlighted in blue.

Name	Version	Package ID	Installed Date	Status
b2bmateIntegration	1.2	pi3	6/24/2024, 3:43 PM	Not Passed
Photo Uploader	2.0.1	MKP002	2/27/2023, 10:30 AM	Passed
License Management App	1.21	stLma	4/18/2023, 9:45 AM	Passed
SalesforceA Connected Apps	1.1	sfadminapps	2/9/2023, 8:01 PM	Passed
Salesforce Mobile Apps	1.22	sf_chtr_apps	2/8/2023, 8:15 AM	Passed
Salesforce.com CRM Dashboards	1.0		1/26/2023, 4:04 PM	Not Applicable
Sales Insights	1.0	OIQ	5/3/2024, 3:14 AM	Not Passed
Opero Signature	2.8	esign	11/28/2023, 1:42 PM	Passed
Milestones PM Plug	14.8	MPM4_BASE	2/7/2023, 12:35 PM	Passed
DevOps Center	6.3	sf_devops	5/8/2023, 12:38 PM	Passed
Pardot	4.98	pi	10/15/2023, 12:46 AM	Passed
SFDC Channel Order	3.70	CHANNEL_ORDERS	11/21/2023, 1:16 PM	Passed
Calendly	2.6	Calendly	7/5/2023, 1:57 PM	Not Passed
Flow Actions for Pardot	1.4	sl_flow	5/18/2024, 10:14 PM	Passed
Web3 Enabler Blockchain Payments	2.1	mukn_web3enable	7/1/2024, 3:19 PM	Passed

## Create Additional Permissions Sets

Create the permission sets required to use the Blockchain Payments application.

### 1. Click Setup.

The screenshot shows the 'Web3 Enabler Setup' page in Salesforce. The page title is 'Web3 Enabler One Time Setup: Authorization and Authentication'. Below the title, there's a paragraph of introductory text. The page is divided into two main sections: 'Step 1: Create an Additional Permission Sets' and 'Step 2: Create the Integration User'. In the top right corner, there's a 'Setup' button with a gear icon, and an arrow labeled '1. Click' points to it. Below the 'Setup' button, there's a dropdown menu with options: 'Setup for current app', 'Marketing Setup', 'Service Setup', 'Your Account', and 'Developer Console'. An arrow labeled '2. Click' points to the 'Setup' button in the navigation bar. The 'Step 1' section contains instructions for creating two permission sets: 'Web3 Enabler Integration Access' and 'Web3 Enabler Object Access'. The 'Step 2' section contains instructions for creating an integration user.

### Web3 Enabler One Time Setup: Authorization and Authentication

Thank you for installing Web3 Enabler Blockchain Data Products. Web3 Enabler uses a connected app and an integration user to bring Blockchain Data into Salesforce. To comply with requirements, administrators must create and authorize this user. All Web3 Enabler products will utilize the same Connected App and Integration User. Failure to do this step will result in failures to connect Blockchain Payment data to Salesforce data.

#### Step 1: Create an Additional Permission Sets

Web3 Enabler includes the permission sets necessary for most operations. There are a few permissions that cannot be added by developers, so we will walk through the installation. The permission in question are authorization to the ConnectedApp, that allows the communication, and access to the Standard Object Account. Step by step instructions are as follows:

Enter Setup, Search for Permission Sets and create 2 following permission sets.

- Create a new Permission Set named 'Web3 Enabler Integration Access' without license.
  - Choose 'Assigned Connected App' -> Add 'MuKn Web3 CA'.
- Create a new Permission Set named 'Web3 Enabler Object Access' with license 'Salesforce API Integration'.
  - Choose 'Object Settings' -> Choose 'Accounts' -> Edit -> View All.

#### Step 2: Create the Integration User

We highly recommend the use of a Salesforce Integration user for this program. Web3 Data is highly sensitive data, and the data being reported is financial. We want a clear history in Salesforce of any changes here. Requirements of this User are as follows:

- Enter Setup, and Create Users.
- Give your new Integration User reasonable names and logins.
- Use an email you can monitor.
- Salesforce License: Salesforce Integration.
- Salesforce Profile: Salesforce API Only System Integrations.
- After saving, Edit Permission Sets for this user and assign:
  - Web3 Enabler Integration User (Managed).
  - Created in Step 1 - Web3 Enabler Integration Access and Web3 Enabler Object Access

## 2. Click Permission Sets.

Sandbox: NilesDev1 | Log out

Setup Home

ADMINISTRATION

- Users
  - Permission Set Groups
  - Permission Sets** ← Click
  - Profiles
  - Public Groups
  - Queues
  - Roles
  - User Management Settings
- Data
- Email

PLATFORM TOOLS

- Apps
- Feature Settings
- Slack
- Account Engagement
- Heroku
- Einstein
- Objects and Fields
- Events
- Process Automation
- User Interface

**Most Recently Used**

3 items

NAME	TYPE	OBJECT
<a href="#">Google Drive</a>	External Data Source	
<a href="#">Niles Lee-Smith</a>	User	
<a href="#">Cold outreach 1</a>	Email Template	

## 3. Click New.

Sandbox: NilesDev1 | Log out

Setup Permission Sets

ADMINISTRATION

- Users
  - Permission Set Groups
  - Permission Sets**
  - Profiles
  - Public Groups
  - Queues
  - Roles
  - User Management Settings
- Data
- Email

PLATFORM TOOLS

- Apps
- Feature Settings
- Slack
- Account Engagement
- Heroku
- Einstein
- Objects and Fields
- Events
- Process Automation
- User Interface

**Permission Sets**

On this page you can create, view, and manage permission sets.

All Permission Sets | Edit | Delete | Create New View

New

Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	<a href="#">Account Engagement Connector User</a>		Salesforce
<input type="checkbox"/> Clone	<a href="#">Account Engagement Integration User</a>		
<input type="checkbox"/> Del   Clone	<a href="#">Account Engagement Missing Features</a>	Grant the features and field level security missing from the Integration User.	
<input type="checkbox"/> Clone	<a href="#">Account Engagement Package</a>	Grants access to Account Engagement data via the managed package.	
<input type="checkbox"/> Clone	<a href="#">Account Engagement User</a>	Gives the user access to the Account Engagement app and related marke...	Account Engagement
<input type="checkbox"/> Del   Clone	<a href="#">Alex Hochberger Emails</a>		
<input type="checkbox"/> Del   Clone	<a href="#">Alexander Smart Emails</a>		
<input type="checkbox"/> Clone	<a href="#">Analytics View Only User</a>	User permissions for View-only licensed apps.	Analytics View Only Embedded App
<input type="checkbox"/> Del   Clone	<a href="#">Apolo Integration</a>		Salesforce Integration
<input type="checkbox"/> Del   Clone	<a href="#">AppExchange Access</a>		
<input type="checkbox"/> Clone	<a href="#">C360 High Scale Flow Integration User</a>	Allows integration user to access features specific to C360 High Scale Flow.	Cloud Integration User
<input type="checkbox"/> Clone	<a href="#">COA Admin User</a>	Contains permissions required to administer the Channel Order App.	
<input type="checkbox"/> Clone	<a href="#">COA User</a>	Contains permissions required to use the Channel Order App.	
<input type="checkbox"/> Clone	<a href="#">CRM Analytics Platform Admin</a>	Create and customize CRM Analytics apps, dashboards, datasets and dat...	Analytics Platform
<input type="checkbox"/> Clone	<a href="#">CRM Analytics Platform User</a>	View CRM Analytics apps and dashboards.	Analytics Platform
<input type="checkbox"/> Clone	<a href="#">CRM User</a>	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/> Clone	<a href="#">Calendly</a>		

1-25 of 88 | 0 Selected | Previous Next | Page 1 of 4

#### 4. Create and save Web3 Enabler Integration Access Permission Set.

The screenshot shows the Salesforce Setup interface for creating a new Permission Set. The left sidebar lists navigation options under 'ADMINISTRATION' and 'PLATFORM TOOLS'. The main content area is titled 'Permission Sets' and 'Create'. It contains a form with the following fields:

- Label:** Web3 Enabler Integration Access (indicated by a blue arrow and the text "1. Enter 'Web3 Enabler Integration Access'")
- API Name:** Web3\_Enabler\_Integration\_Access
- Description:** (empty text area)
- Session Activation Required:**

Below the form, there is a section titled "Select the type of users who will use this permission set" with instructions and a dropdown menu for "License" set to "--None--". A blue arrow points to the "Save" button with the text "2. Click".

#### 5. View Web3 Enabler Integration Access Permission Set and click Assigned Connected Apps.

The screenshot shows the 'Web3 Enabler Integration Access' Permission Set overview page in Salesforce Setup. The page includes a search bar, navigation links, and a 'Permission Set Overview' section with the following details:

Description	API Name
	Web3_Enabler_Integration_Access

Additional details shown:

- License:** --None--
- Namespace Prefix:**
- Created By:** Niles Lee-Smith, 7/26/2024, 11:55 AM
- Last Modified By:** Niles Lee-Smith, 7/26/2024, 11:55 AM
- Session Activation Required:**
- Permission Set Groups Added To:** 0

The 'Apps' section is visible, with a blue arrow pointing to the 'Assigned Connected Apps' link and the text "Click".

## 6. Click Edit.

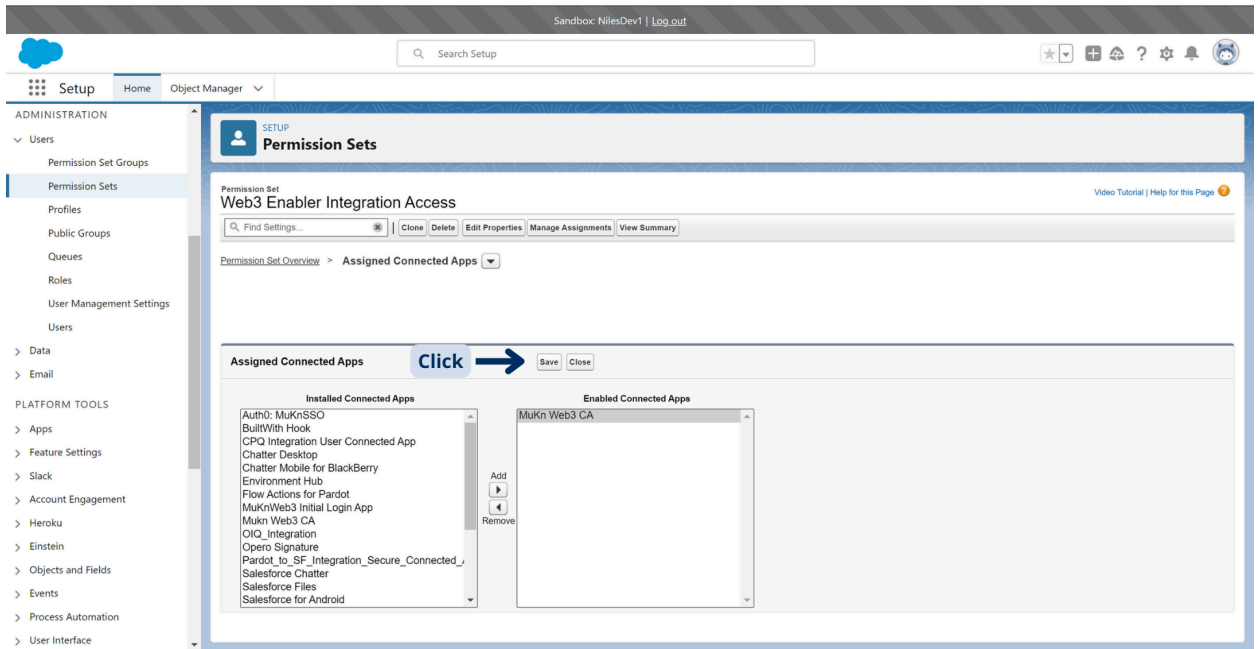
The screenshot shows the Salesforce Setup interface. The left sidebar contains the navigation menu with 'Setup' selected. The main content area is titled 'Permission Sets' and shows the configuration for 'Web3 Enabler Integration Access'. Below the title bar, there are buttons for 'Find Settings...', 'Clone', 'Delete', 'Edit Properties', 'Manage Assignments', and 'View Summary'. A breadcrumb trail indicates 'Permission Set Overview > Assigned Connected Apps'. Below this, there are controls for 'Items per page' (set to 50) and 'View' (set to All). The 'Assigned Connected Apps' section is highlighted with a blue box, and a blue arrow labeled 'Click' points to the 'Edit' button next to it.

## 7. Select MuKn Web3 CA and click Add.

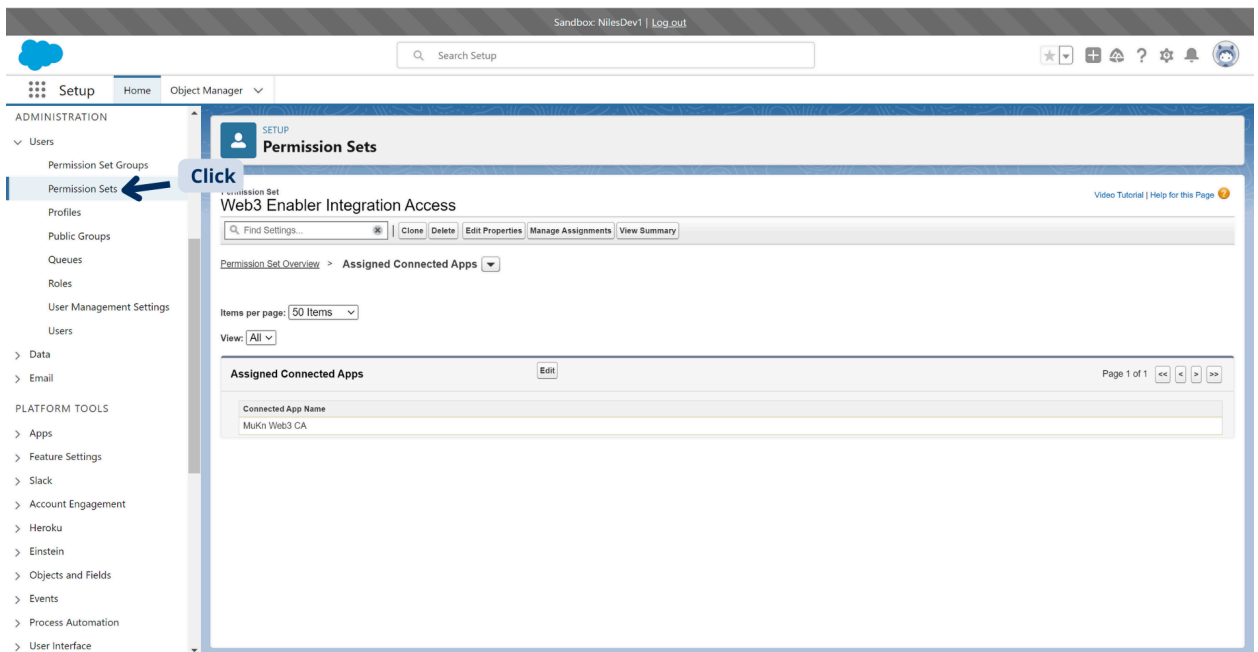
The screenshot shows the same Salesforce Setup interface as in step 6. The 'Assigned Connected Apps' section is expanded to show a list of installed and enabled connected apps. The 'Installed Connected Apps' list includes 'Auth0: MuKnSSO', 'BuiltWith Hook', 'CPQ Integration User Connected App', 'Chatter Desktop', 'Chatter Mobile for BlackBerry', 'Environment Hub', 'Flow Actions for Pardot', 'MuKn Web3 CA', 'MuKnWeb3 Initial Login App', 'Mukn Web3 CA', 'OIQ\_integration', 'Opere Signature', 'Pardot\_to\_SF\_Integration\_Secure\_Connected\_', 'Salesforce Chatter', and 'Salesforce Files'. The 'Enabled Connected Apps' list is currently empty, showing '--None--'. A blue arrow labeled '1. Click' points to 'MuKn Web3 CA' in the installed list, and another blue arrow labeled '2. Click' points to the 'Add' button between the two lists.



8. Click Save.



9. View Web3 Enabler Integration Access and Assigned Connected Apps and click Permission Sets.



## 10. Click New.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with 'Setup' selected. Under 'Setup', 'Permission Sets' is highlighted. The main content area is titled 'Permission Sets' and includes a 'New' button. A blue arrow points to the 'New' button with the text 'Click'.

Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Account Engagement Connector User		Salesforce
<input type="checkbox"/> Clone	Account Engagement Integration User		
<input type="checkbox"/> Del   Clone	Account Engagement Missing Features	Grant the features and field level security missing from the Integration User.	
<input type="checkbox"/> Clone	Account Engagement Package	Grants access to Account Engagement data via the managed package.	
<input type="checkbox"/> Clone	Account Engagement User	Gives the user access to the Account Engagement app and related marke...	Account Engagement
<input type="checkbox"/> Del   Clone	Alex Hochberger Emails		
<input type="checkbox"/> Del   Clone	Alexander Smart Emails		
<input type="checkbox"/> Clone	Analytics View Only User	User permissions for View-only licensed apps.	Analytics View Only Embedded App
<input type="checkbox"/> Del   Clone	Apollo Integration		Salesforce Integration
<input type="checkbox"/> Del   Clone	AppExchange Access		
<input type="checkbox"/> Clone	C360 High Scale Flow Integration User	Allows integration user to access features specific to C360 High Scale Flow.	Cloud Integration User
<input type="checkbox"/> Clone	COA Admin User	Contains permissions required to administer the Channel Order App.	
<input type="checkbox"/> Clone	COA User	Contains permissions required to use the Channel Order App.	
<input type="checkbox"/> Clone	CRM Analytics Platform Admin	Create and customize CRM Analytics apps, dashboards, datasets and dat...	Analytics Platform
<input type="checkbox"/> Clone	CRM Analytics Platform User	View CRM Analytics apps and dashboards.	Analytics Platform
<input type="checkbox"/> Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/> Clone	Calendarly		

## 11. Create and save Web3 Enabler Object Access Permission Set.

The screenshot shows the 'Create' form for a new Permission Set. The 'Label' field contains 'Web3 Enabler Object Access' and the 'API Name' field contains 'Web3\_Enabler\_Object\_Access'. A blue arrow points to the 'Label' field with the text '1. Enter "Web3 Enabler Object Access"'. At the bottom, another blue arrow points to the 'Save' button with the text '2. Click'.

Enter permission set information

Label: Web3 Enabler Object Access

API Name: Web3\_Enabler\_Object\_Access

Description: [Empty text area]

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

- Choose --None-- if you plan to assign this permission set to multiple users with different user and permission set licenses.
- Choose a specific user license if you want users with only one license type to use this permission set.
- Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

License: Salesforce API Integration

Save Cancel

## 12. View Web3 Enabler Object Access Permission Set and click Object Settings.

The screenshot shows the Salesforce Setup interface for the 'Web3 Enabler Object Access' Permission Set. The left sidebar contains navigation options under 'ADMINISTRATION' and 'PLATFORM TOOLS'. The main content area displays the 'Permission Set Overview' with details like 'API Name: Web3\_Enabler\_Object\_Access' and 'Created By: Niles Lee-Smith'. Below this, the 'Apps' section lists various permission categories such as 'App Permissions', 'Flow Access', and 'External Credential Principal Access'. A blue arrow labeled 'Click' points to the 'Object Settings' link, which is described as 'Permissions to access objects and fields, and settings such as tab availability'.

## 13. Click Accounts.

The screenshot shows the 'Object Settings' table for the 'Web3 Enabler Object Access' Permission Set. The table has columns for 'Object Name', 'Object API Name', 'Object Permissions', 'Total Fields', and 'Tab Settings'. A blue arrow labeled 'Click' points to the 'Accounts' row. The table lists various objects and their associated permissions and field counts.

Object Name	Object API Name	Object Permissions	Total Fields	Tab Settings
Account Brands	AccountBrand	No Access	9	--
Accounts	Account	No Access	55	--
Account UTXO Addresses	mukn_web3enable__Account_UTXO_Address__c	No Access	9	--
Account Wallet	mukn_web3enable__Account_Wallet__c	No Access	15	--
Addresses	Address	No Access	7	--
AI Insight Reasons	AIInsightReason	No Access	--	--
AI Record Insights	AIRecordInsight	No Access	--	--
App Analytics Query Requests	AppAnalyticsQueryRequest	No Access	--	--
Archive Job Sessions	ArchiveJobSession	No Access	--	--
Asset Relationships	AssetRelationship	--	10	--
Assets	Asset	No Access	34	--
Asset Tokens	mukn_web3enable__Asset_Token__c	No Access	13	--
Asynchronous Request Response Events	AsyncRequestResponseEvent	No Access	--	--
Async Operation Results	sf_devops__Async_Operation_Result__c	No Access	12	--
Async Requests	pi__AsyncRequest__c	No Access	9	--
Background Operations	BackgroundOperation	No Access	--	--
Back Syncs	sf_devops__Back_Sync__c	No Access	10	--
Branches	sf_devops__Branch__c	No Access	10	--
Browser-set Topic Collaboration Rooms	BrowserSetTopicCollabRoom	No Access	--	--

## 14. Click Edit.

The screenshot shows the Salesforce Setup interface for the 'Web3 Enabler Object Access' permission set. The left sidebar lists navigation options under 'ADMINISTRATION' and 'PLATFORM TOOLS'. The main content area shows the 'Accounts' dropdown menu expanded, with the 'Edit' button highlighted by a blue arrow and the text 'Click'.

Permission Name	Enabled
Read	<input type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

Field Name	Field API Name	Read Access	Edit Access
Account Description	Description	<input type="checkbox"/>	<input type="checkbox"/>
Account Name	Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Number	AccountNumber	<input type="checkbox"/>	<input type="checkbox"/>
Account Owner	OwnerId	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Site	Site	<input type="checkbox"/>	<input type="checkbox"/>
Account Source	AccountSource	<input type="checkbox"/>	<input type="checkbox"/>
Annual Revenue	AnnualRevenue	<input type="checkbox"/>	<input type="checkbox"/>
Apollo Account Id	Apollo_Account_Id__c	<input type="checkbox"/>	<input type="checkbox"/>

## 15. Select Read and View All and click Save.

The screenshot shows the Salesforce Setup interface for the 'Web3 Enabler Object Access' permission set. The 'Accounts' dropdown is selected, and the 'Save' button is highlighted with a blue arrow and the text '3. Click'. The 'Read' and 'View All' checkboxes in the 'Object Permissions' table are also highlighted with blue arrows and the text '1. Click' and '2. Click' respectively.

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input checked="" type="checkbox"/>
Modify All	<input type="checkbox"/>

Field Name	Field API Name	Read Access	Edit Access
Account Description	Description	<input type="checkbox"/>	<input type="checkbox"/>
Account Name	Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Number	AccountNumber	<input type="checkbox"/>	<input type="checkbox"/>
Account Owner	OwnerId	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Site	Site	<input type="checkbox"/>	<input type="checkbox"/>
Account Source	AccountSource	<input type="checkbox"/>	<input type="checkbox"/>
Annual Revenue	AnnualRevenue	<input type="checkbox"/>	<input type="checkbox"/>
Apollo Account Id	Apollo_Account_Id__c	<input type="checkbox"/>	<input type="checkbox"/>

## 16. View Web3 Enabler Object Access and Object Permissions and click Users.

The screenshot shows the Salesforce Setup interface. The left sidebar is expanded to 'Users', with a blue arrow pointing to the 'Users' link and the word 'Click' next to it. The main content area is titled 'Web3 Enabler Object Access' and shows the configuration for this permission set. It includes a search bar, 'Clone', 'Delete', 'Edit Properties', 'Manage Assignments', and 'View Summary' buttons. Below this, there are sections for 'Accounts' and 'Object Permissions' (a table with columns 'Permission Name' and 'Enabled') and 'Field Permissions' (a table with columns 'Field Name', 'Field API Name', 'Read Access', and 'Edit Access').

Create an Integration User  
Create an Integration User to connect Blockchain Payments with your Salesforce Org.

### 1. Click New User.

The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar is expanded to 'Users'. The main content area is titled 'All Users' and contains a table of users. A blue arrow points to the 'New User' button in the top right of the user list, with the word 'Click' next to it. The table has columns for 'Action', 'Full Name', 'Alias', 'Username', 'Last Login', 'Role', 'Active', and 'Profile'. The table lists various users, including 'Apollo Integration User', 'Automation User', 'Beacom, Kristina', 'Bedlinski, Michael', 'Blondeel, Sebastian', 'Brallerman, Zoe', 'Brooks, Layla', 'BuiltWith Integration', 'Calendly Integration', 'Chatter Expert', 'Cramosle, Drew', 'Deberry, Cathryn', 'Flisk, Donald', 'Goldberg, Spencer', and 'Grzybowski, Marcin'.

## 2. Create a new user and save.

The screenshot shows the 'New User' form in Salesforce Setup. The form is divided into 'General Information' and 'Role' sections. Annotations with arrows point to specific fields:

- 1. Enter user First Name** points to the 'First Name' field containing 'Niles'.
- 2. Enter user Last Name** points to the 'Last Name' field containing 'Lee-Smith'.
- 2. Enter user Alias** points to the 'Alias' field containing 'NilesDev'.
- 3. Enter user Email** points to the 'Email' field containing 'niles@web3enabler.com'.
- 4. Select Salesforce Integration** points to the 'Role' dropdown menu.
- 5. Select Salesforce API Only Integrations** points to the 'User License' dropdown menu.
- 6. Click** points to the 'Save' button.

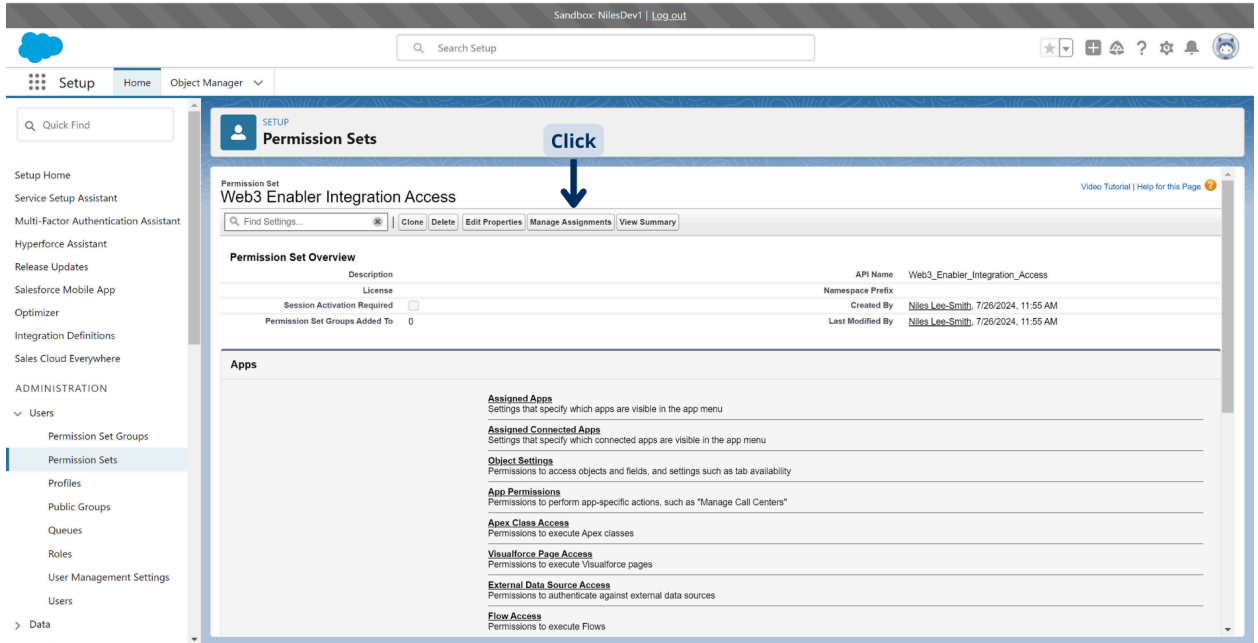
## 3. Click Permission Sets and click Web3 Enabler Integration Access.

The screenshot shows the 'Permission Sets' page in Salesforce Setup. The page displays a table of permission sets. Annotations with arrows point to specific elements:

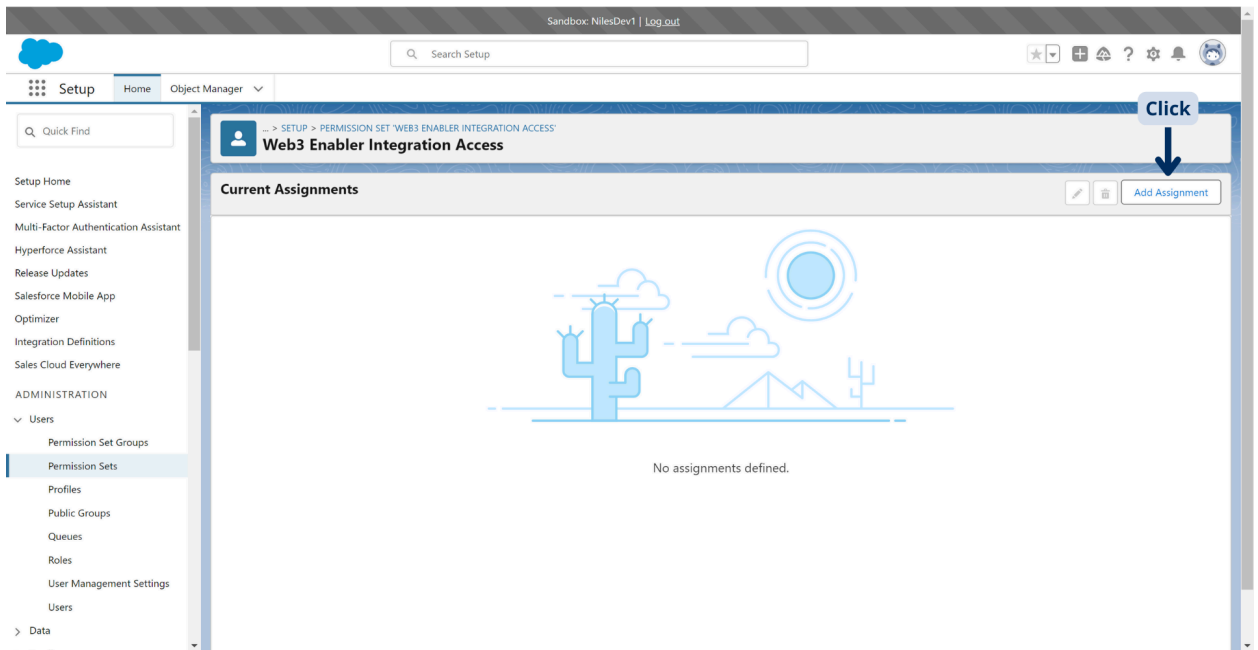
- 1. Click** points to the 'Permission Sets' link in the left-hand navigation menu.
- 2. Click** points to the 'Web3 Enabler Integration Access' permission set in the table.

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Clone Slack Service User	Lets users run the flows for swarming with Service Cloud for Slack.	Slack Service User
<input type="checkbox"/>	Clone Standard Einstein Activity Capture	Access to Standard Einstein Activity Capture	Standard Einstein Activity Capture User
<input type="checkbox"/>	Del   Clone Superuser Permissions		
<input type="checkbox"/>	Clone Trust Card Manager	Lets users create, read, edit, and delete trust measures for their location's...	Trust Card Manager
<input type="checkbox"/>	Del   Clone ValueText User_Template Editor1	This user can Edit or Create Template and SMS Sending permission	
<input type="checkbox"/>	Del   Clone ValueText User1	Only SMS sending permission is available.	
<input type="checkbox"/>	Clone Web3 Enabler Blockchain Payments Admin (Managed)	Administrator access to Blockchain Payments Data.	
<input type="checkbox"/>	Clone Web3 Enabler Blockchain Payments Integration (Managed)	Access Permissions to Web3 Enabler Blockchain Payments objects for th...	
<input type="checkbox"/>	Clone Web3 Enabler Blockchain Payments Manager (Managed)	Blockchain Payments Manager permissions - Includes the ability to mana...	
<input type="checkbox"/>	Clone Web3 Enabler Blockchain Payments User (Managed)	Standard User Permissions for Web3 Enabler's Blockchain Paymets.	
<input type="checkbox"/>	Del   Clone Web3 Enabler Integration Access		
<input type="checkbox"/>	Del   Clone Web3 Enabler Object Access		Salesforce API Integration
<input type="checkbox"/>	Clone Your Account App Admin User	Manage your Salesforce subscriptions with the Your Account app.	Your Account App
<input type="checkbox"/>	Del   Clone Contact for Salesforce Lightning Edition		Salesforce
<input type="checkbox"/>	Del   Clone sf_devops_InitializeEnvironments	Allows managers of the DevOps Center to manage connections to develo...	
<input type="checkbox"/>	Del   Clone sf_devops_NamedCredentials	Grants access to the Named Credentials needed to authenticate to work e...	
<input type="checkbox"/>	Clone stic.activityplatform	Permet for the 'stic:activityplatform' C2C integration	Cloud Integration User

#### 4. Click Manage Assignments.



#### 5. Click Add Assignment.



## 6. Select user(s) and Click Next.

Screenshot of the Salesforce Setup interface showing the 'Select Users to Assign' screen. The page title is 'Select Users to Assign'. The breadcrumb trail is 'All Users'. A search bar is present with the text 'Search this list...'. The table below shows a list of users with columns for Full Name, Alias, Username, Role, Act..., and Profile. The user 'Niles Lee-Smith' is selected, indicated by a checked checkbox. An arrow labeled '1. Select user(s)' points to this checkbox. At the bottom right, an arrow labeled '2. Click' points to the 'Next' button.

Full Name	Alias	Username	Role	Act...	Profile
[Redacted]	M...e	ma...dev1	Data Users	<input type="checkbox"/>	Standard User
Ma...ski	M...n	ma...dev1	Data Admin	<input checked="" type="checkbox"/>	Standard Platform User
Mi...nski	M...lB	mb...dev1	Data Users	<input checked="" type="checkbox"/>	System Administrator
M...est	M...e	mi...dev1	Data Users	<input type="checkbox"/>	Standard User
<input checked="" type="checkbox"/> Niles Lee-Smith	Niles	niles@web3enabler.com.nilesdev1	Data Admin	<input checked="" type="checkbox"/>	System Administrator
Pe...zuk	P...y	pu...dev1	Data Users	<input checked="" type="checkbox"/>	Standard Platform User
Pe...an	P...f	pe...dev1	Data Admin	<input checked="" type="checkbox"/>	Marketing User
R...n	re...a	re...dev1	Data Users	<input checked="" type="checkbox"/>	Marketing User

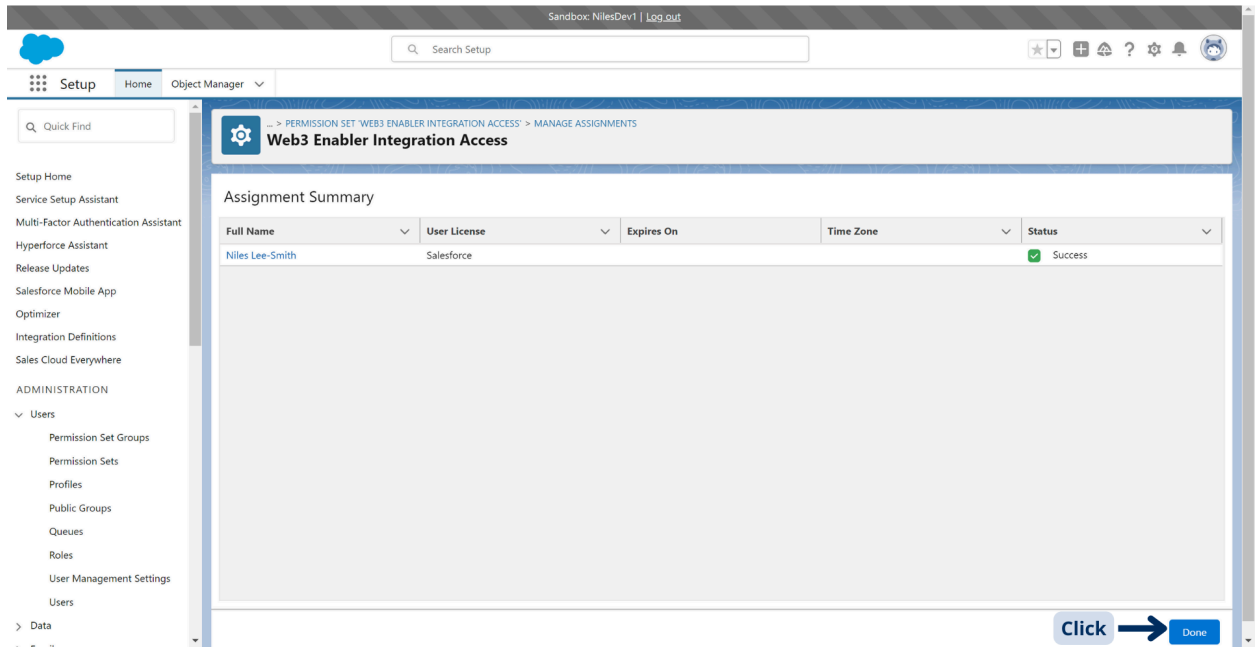
## 7. Select Expiration Date and click Assign.

Screenshot of the Salesforce Setup interface showing the 'Web3 Enabler Integration Access' screen. The breadcrumb trail is 'PERMISSION SET 'WEB3 ENABLER INTEGRATION ACCESS' > MANAGE ASSIGNMENT EXPIRATION'. The page title is 'Web3 Enabler Integration Access'. The main heading is 'Select an Expiration Option For Assigned Users'. There are two radio button options: 'No expiration date' (selected) and 'Specify the expiration date'. An arrow labeled '1. Pick' points to the 'No expiration date' radio button. Below the options are buttons for '1 Day', '1 Week', '30 Days', '60 Days', and 'Custom Date', along with a 'Time Zone' dropdown menu. A table below shows the 'Selected Users' with columns for Full Name, Role, Profile, Active, User License, and Expires On. The user 'Niles Lee-Smith' is listed with 'Never Expires'. At the bottom right, an arrow labeled '2. Click' points to the 'Assign' button.

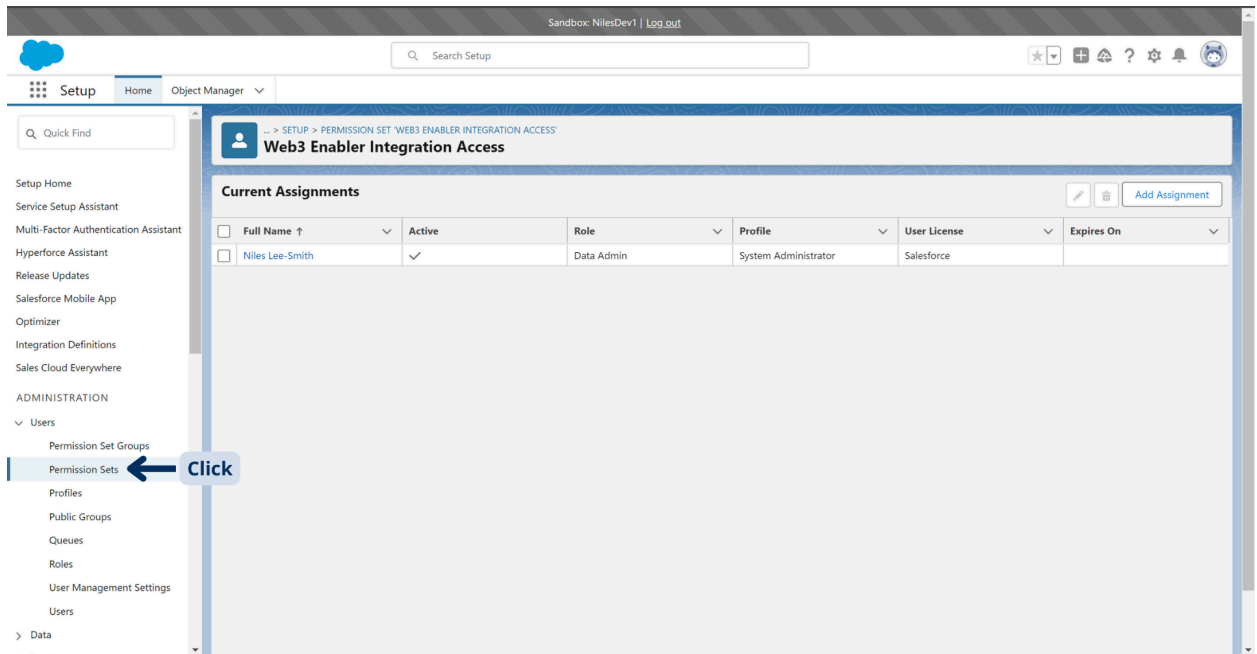
Full Name	Role	Profile	Active	User License	Expires On
Niles Lee-Smith	Data Admin	System Administrator	<input checked="" type="checkbox"/>	Salesforce	Never Expires



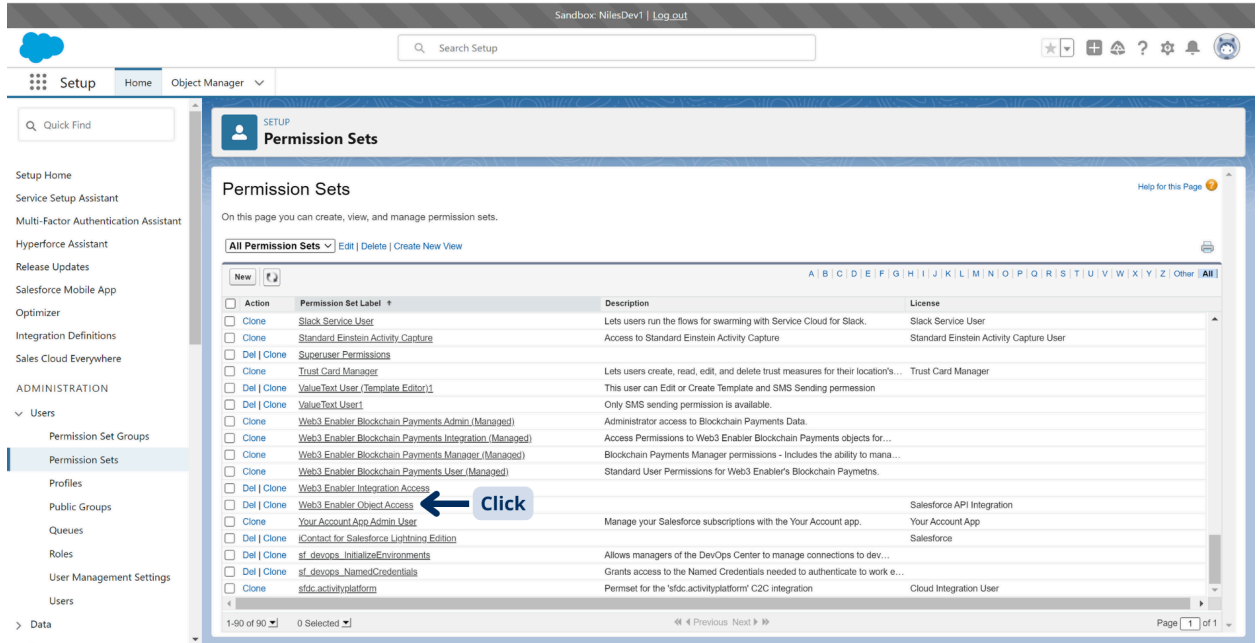
8. View Assignment Summary and click Done.



9. View Web3 Enabler Integration Access and click Permission Sets.



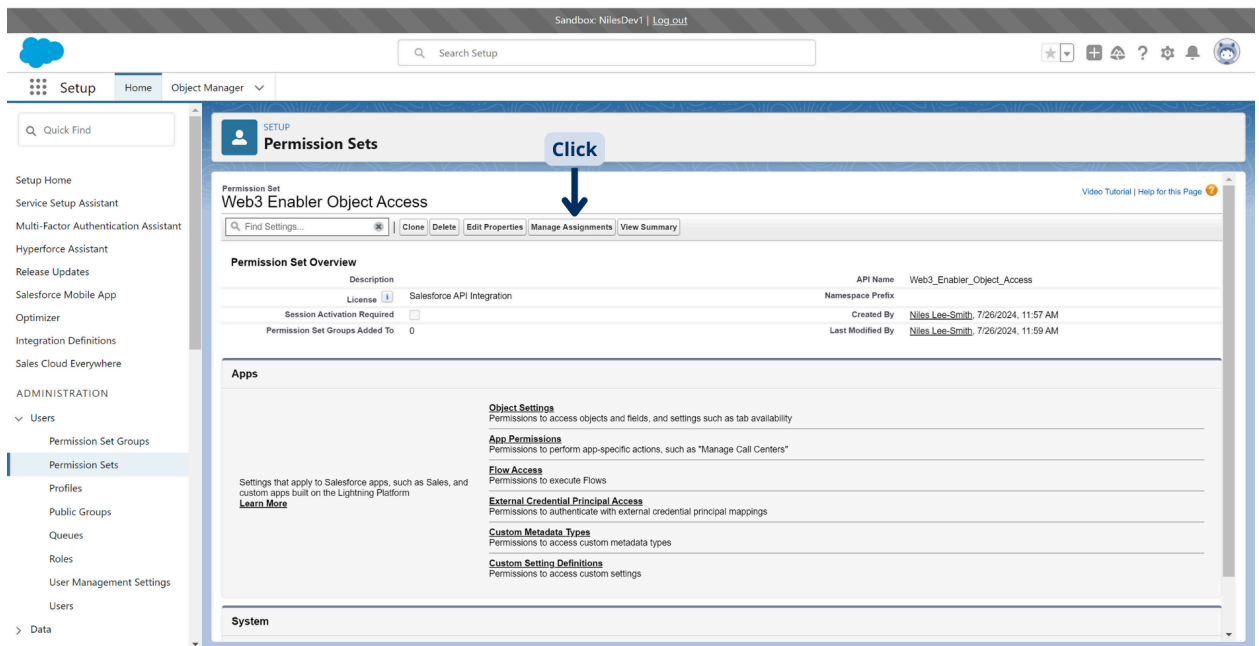
## 10. Click Web3 Enabler Object Access.



The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation options like 'Setup Home', 'Service Setup Assistant', and 'ADMINISTRATION'. The main content area is titled 'Permission Sets' and displays a table of existing permission sets. A blue arrow labeled 'Click' points to the 'Web3 Enabler Object Access' row in the table.

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Clone Slack Service User	Lets users run the flows for swarming with Service Cloud for Slack.	Slack Service User
<input type="checkbox"/>	Clone Standard Einstein Activity Capture	Access to Standard Einstein Activity Capture	Standard Einstein Activity Capture User
<input type="checkbox"/>	Del   Clone Superuser Permissions		
<input type="checkbox"/>	Clone Trust Card Manager	Lets users create, read, edit, and delete trust measures for their location's...	Trust Card Manager
<input type="checkbox"/>	Del   Clone ValueText User (Template Editor)	This user can Edit or Create Template and SMS Sending permission	
<input type="checkbox"/>	Del   Clone ValueText User	Only SMS sending permission is available.	
<input type="checkbox"/>	Clone Web3 Enabler Blockchain Payments Admin (Managed)	Administrator access to Blockchain Payments Data.	
<input type="checkbox"/>	Clone Web3 Enabler Blockchain Payments Integration (Managed)	Access Permissions to Web3 Enabler Blockchain Payments objects for...	
<input type="checkbox"/>	Clone Web3 Enabler Blockchain Payments Manager (Managed)	Blockchain Payments Manager permissions - Includes the ability to mana...	
<input type="checkbox"/>	Clone Web3 Enabler Blockchain Payments User (Managed)	Standard User Permissions for Web3 Enabler's Blockchain Paymetns.	
<input type="checkbox"/>	Del   Clone Web3 Enabler Integration Access		
<input type="checkbox"/>	Del   Clone Web3 Enabler Object Access		Salesforce API Integration
<input type="checkbox"/>	Clone Your Account App Admin User	Manage your Salesforce subscriptions with the Your Account app.	Your Account App
<input type="checkbox"/>	Del   Clone Contact for Salesforce Lightning Edition		Salesforce
<input type="checkbox"/>	Del   Clone sf_devops_InitializeEnvironments	Allows managers of the DevOps Center to manage connections to dev...	
<input type="checkbox"/>	Del   Clone sf_devops_NamedCredentials	Grants access to the Named Credentials needed to authenticate to work e...	
<input type="checkbox"/>	Clone sfic.activityplatform	Permsset for the 'sfic:activityplatform' C2C integration	Cloud Integration User

## 11. Click Manage Assignments.



The screenshot shows the details page for the 'Web3 Enabler Object Access' permission set. A blue arrow labeled 'Click' points to the 'Manage Assignments' button in the top navigation bar. Below the navigation bar, there is a 'Permission Set Overview' section with details like 'Description', 'License', 'API Name', and 'Created By'. The main content area is divided into sections for 'Apps' and 'System', each with a list of permissions.

**Permission Set Overview**

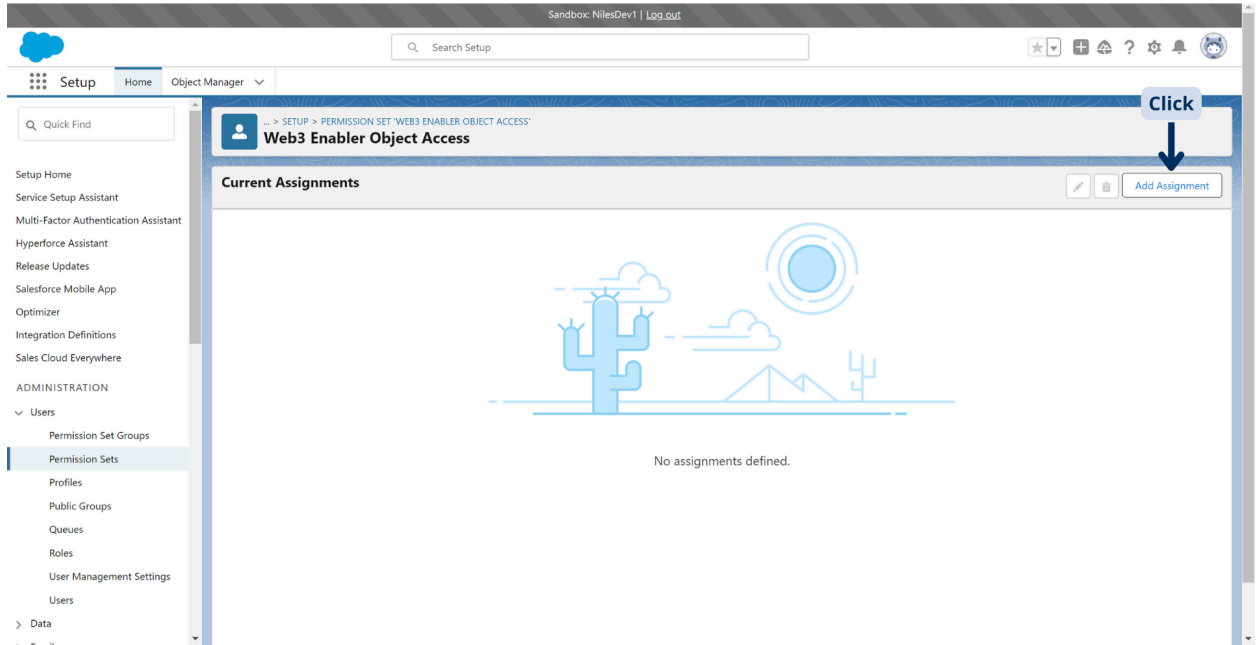
Description	Salesforce API Integration	API Name	Web3_Enabler_Object_Access
License	Salesforce API Integration	Namespace Prefix	
Session Activation Required	<input type="checkbox"/>	Created By	Niles Lee-Smith, 7/26/2024, 11:57 AM
Permission Set Groups Added To	0	Last Modified By	Niles Lee-Smith, 7/26/2024, 11:59 AM

**Apps**

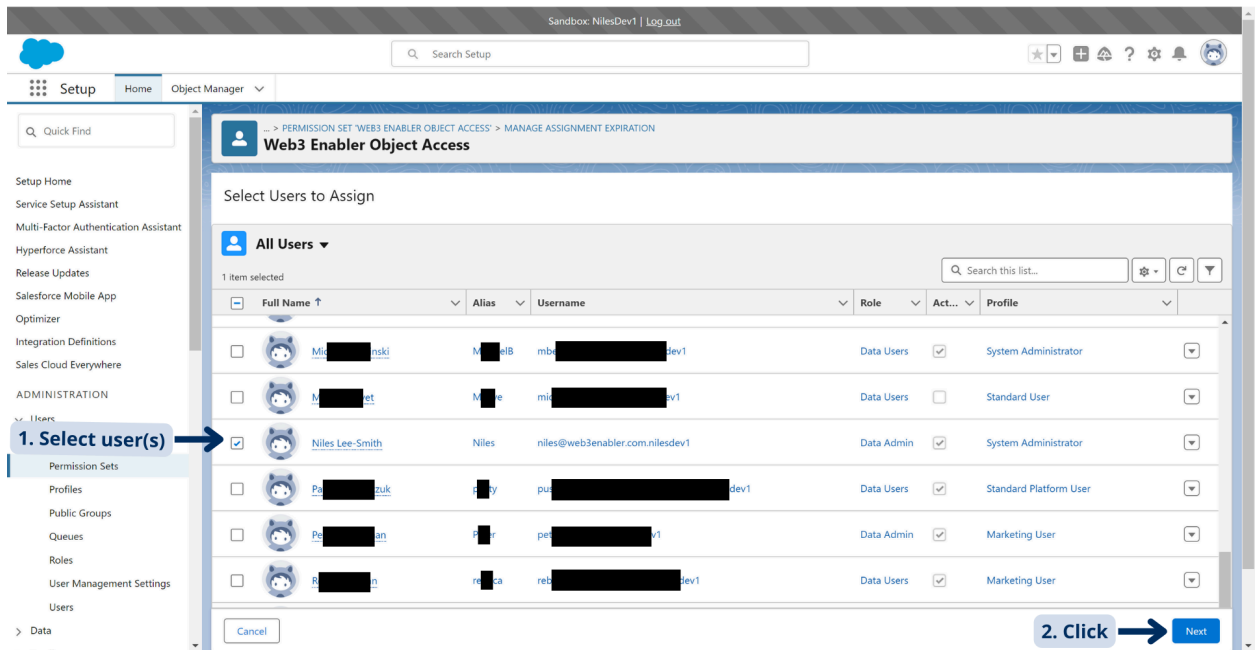
- Object Settings**  
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**  
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Flow Access**  
Permissions to execute Flows
- External Credential Principal Access**  
Permissions to authenticate with external credential principal mappings
- Custom Metadata Types**  
Permissions to access custom metadata types
- Custom Settings Definitions**  
Permissions to access custom settings

**System**

## 12. Click Add Assignment.



## 13. Select user(s) and click Next.



14. Select Expiration Date and click Assign.

Sandbox: NilesDev1 | Log out

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Optimizer

Integration Definitions

Sales Cloud Everywhere

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

> Data

Quick Find

Search Setup

PERMISSION SET 'WEB3 ENABLER OBJECT ACCESS' > MANAGE ASSIGNMENT EXPIRATION

### Web3 Enabler Object Access

Select an Expiration Option For Assigned Users

No expiration date **1. Pick**

Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date

Time Zone: Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
Niles Lee-Smith	Data Admin	System Administrator	✓	Salesforce	Never Expires

Cancel

Back Assign **2. Click**

15. View Assignment Summary and click Done.

Sandbox: NilesDev1 | Log out

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Optimizer

Integration Definitions

Sales Cloud Everywhere

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

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Public Groups

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Roles

User Management Settings

Users

> Data

Quick Find

Search Setup

PERMISSION SET 'WEB3 ENABLER OBJECT ACCESS' > MANAGE ASSIGNMENTS

### Web3 Enabler Object Access

Assignment Summary

Full Name	User License	Expires On	Time Zone	Status
Niles Lee-Smith	Salesforce Integration			✓ Success

Click Done



## 18. Click Edit Assignments.

The screenshot shows the Salesforce Setup interface for the 'Users' section. The user 'Niles Lee-Smith' is selected. The 'Permission Set Assignments' section is highlighted, and a blue arrow points to the 'Edit Assignments' button. The user details table is visible below.

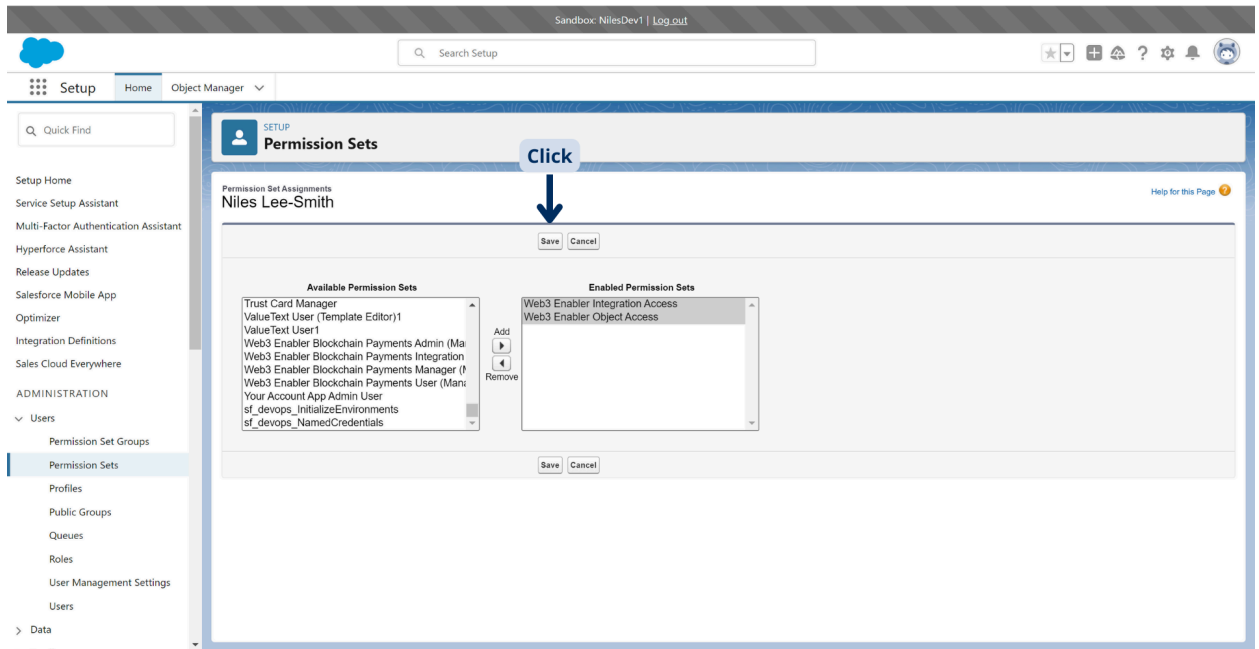
Name	Niles Lee-Smith	Role	Salesforce Integration
Alias	NilesDev	User License	Salesforce Integration
Email	niles@web3enabler.com [Verify]	Profile	Salesforce API Only System Integrations
Username	niles@web3enabler.com.nilesdev2	Active	<input checked="" type="checkbox"/>
Nickname	NilesDev	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Sales Anywhere User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Mobile Push Registrations	<a href="#">View</a>
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Accessibility Mode (Classic Only)	<input type="checkbox"/> [i]
Locale	English (United States)	Debug Mode	<input type="checkbox"/> [i]
Language	English	High-Contrast Palette on Charts	<input type="checkbox"/> [i]
Delegated Approver		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> [i]
Manager		Allow Forecasting	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	No MRU Updates	<input type="checkbox"/> [i]
Federation ID		Call Center	
App Registration: One-Time Password Authenticator	<input type="checkbox"/>	Phone	
App Registration: Salesforce Authenticator	<input type="checkbox"/>	Extension	
Security Key (U2F or WebAuthn)	<input type="checkbox"/>	Fax	

## 19. Click Permission Set Assignments.

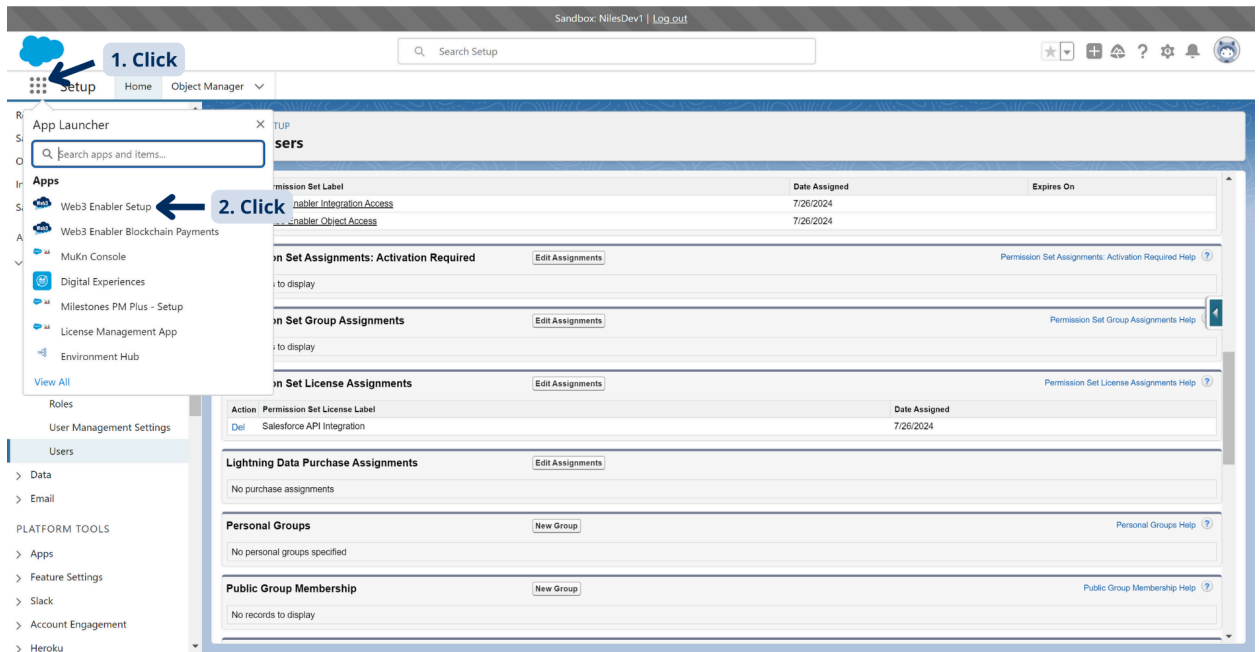
The screenshot shows the Salesforce Setup interface for the 'Users' section. The user 'Niles Lee-Smith' is selected. A blue arrow points to the 'Permission Set Assignments' link in the breadcrumb navigation. The 'User Detail' section is visible below.

Name	Niles Lee-Smith	Role	Salesforce Integration
Alias	NilesDev	User License	Salesforce Integration
Email	niles@web3enabler.com [Verify]	Profile	Salesforce API Only System Integrations
Username	niles@web3enabler.com.nilesdev2	Active	<input checked="" type="checkbox"/>
Nickname	NilesDev	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Sales Anywhere User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Mobile Push Registrations	<a href="#">View</a>
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Accessibility Mode (Classic Only)	<input type="checkbox"/> [i]
Locale	English (United States)	Debug Mode	<input type="checkbox"/> [i]
Language	English	High-Contrast Palette on Charts	<input type="checkbox"/> [i]
Delegated Approver		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> [i]
Manager		Allow Forecasting	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	No MRU Updates	<input type="checkbox"/> [i]
Federation ID		Call Center	
App Registration: One-Time Password Authenticator	<input type="checkbox"/>	Phone	
App Registration: Salesforce Authenticator	<input type="checkbox"/>	Extension	
Security Key (U2F or WebAuthn)	<input type="checkbox"/>	Fax	

20. Click save.



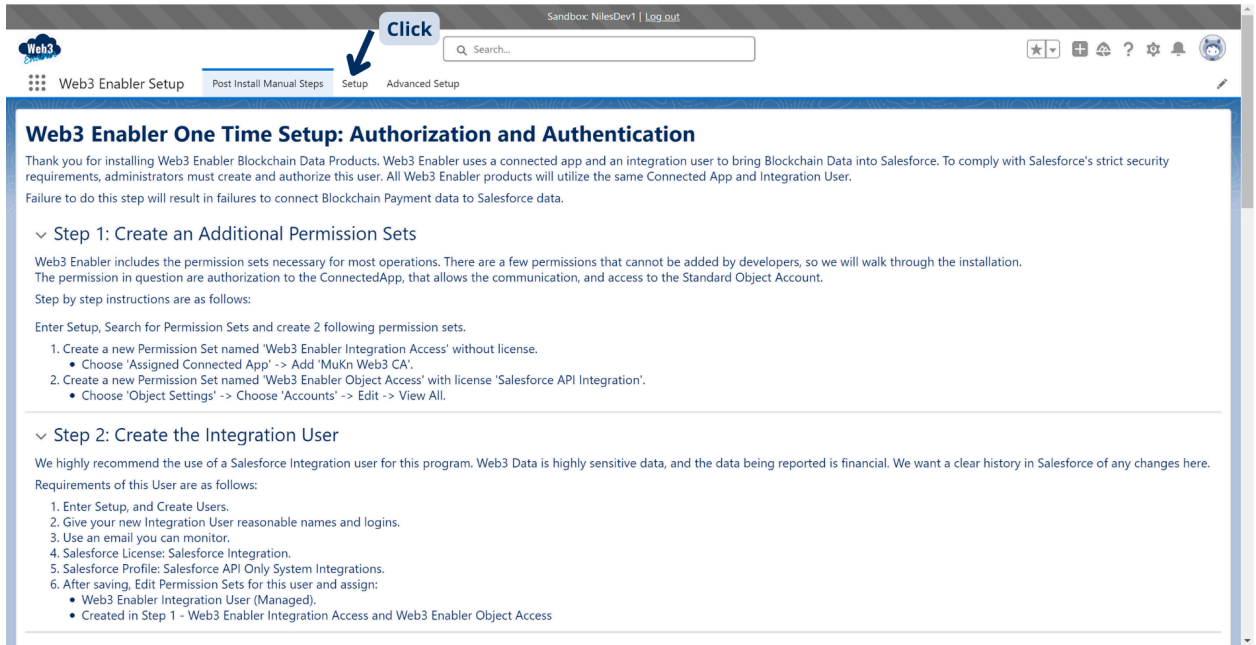
21. View Users Permission Set Assignments and go to Web3 Enabler Setup.



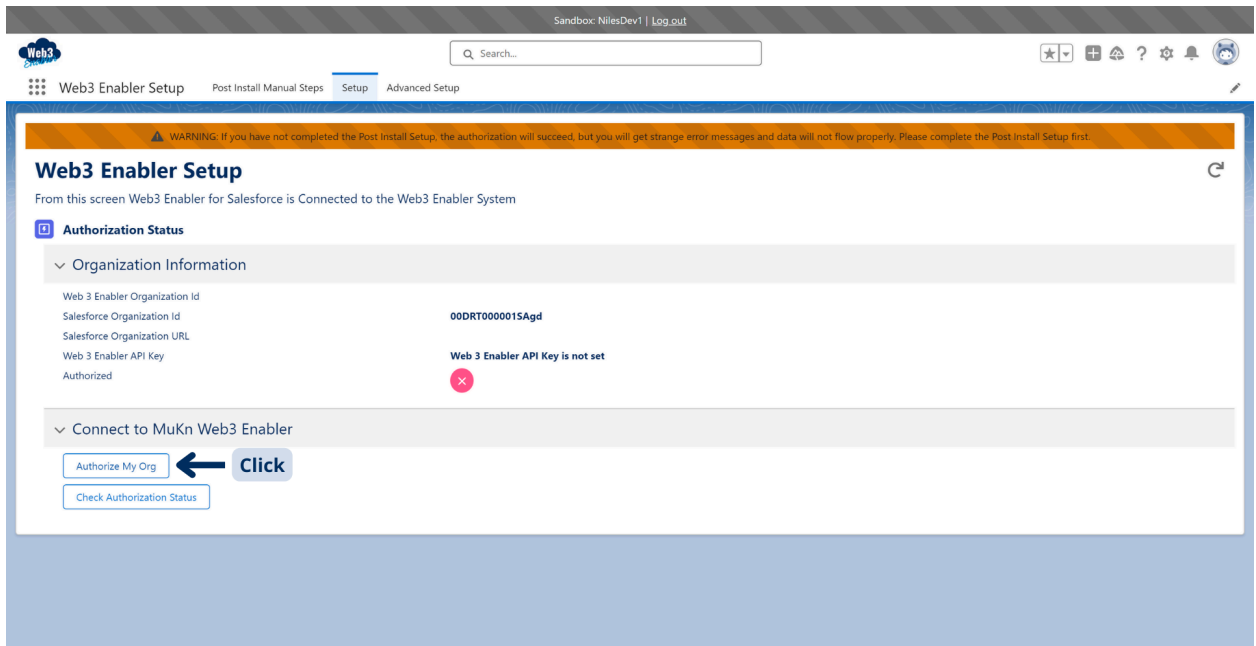
Authorize MuKn Web3 CA

# Configure the one-time authorization and authentication setup to connect Blockchain Payments with your Salesforce Org.

1. Click Setup.

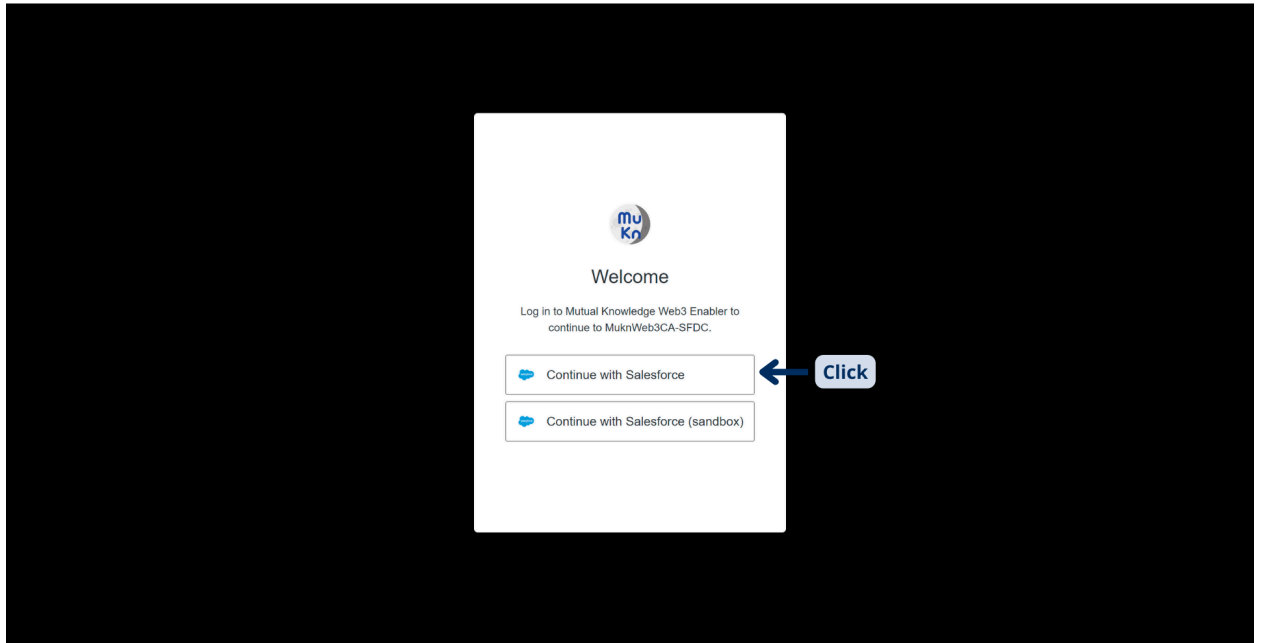


2. Click Authorize My Org.

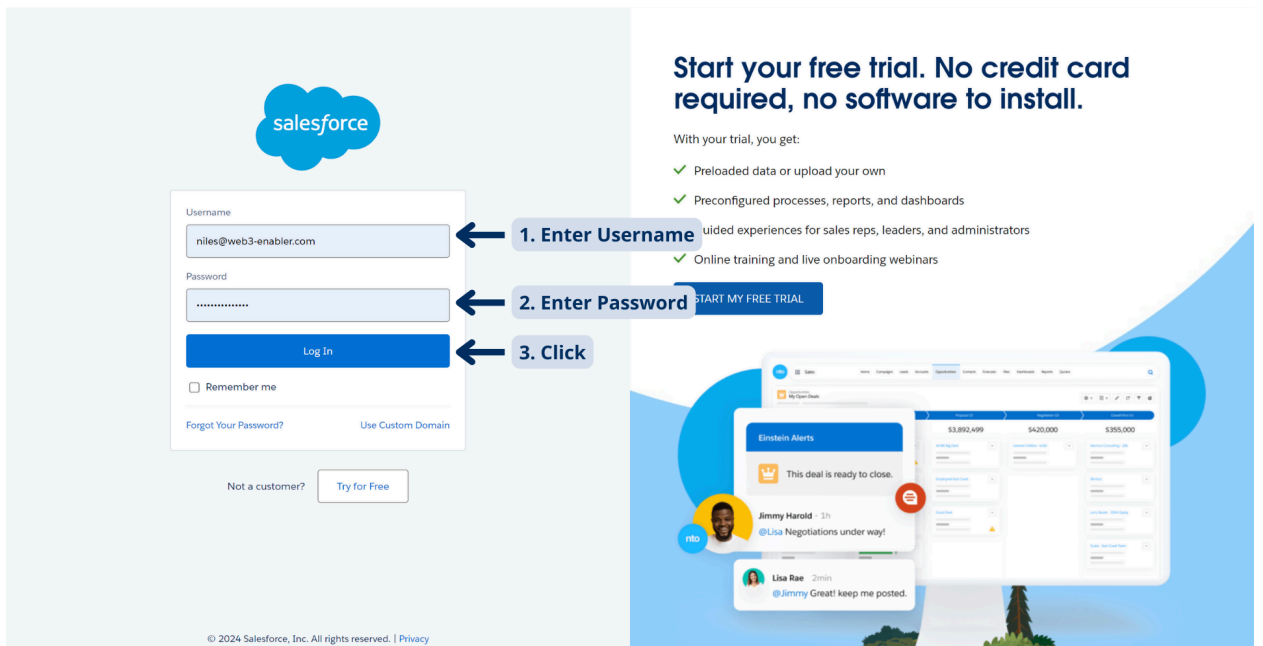




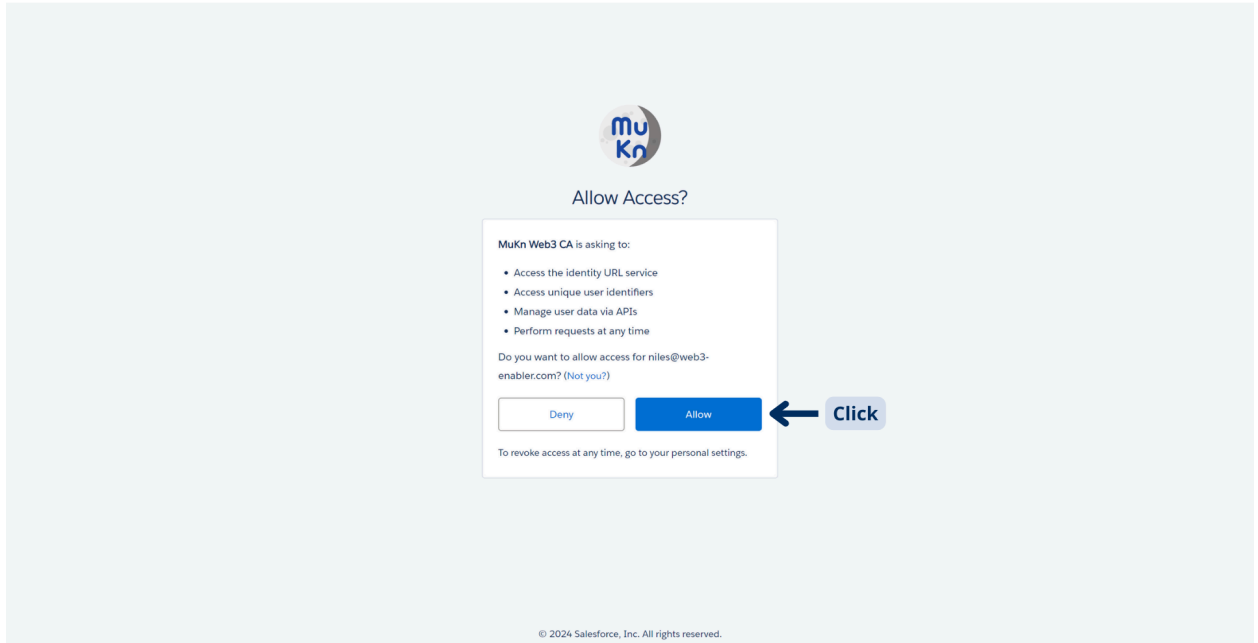
3. Click Continue with Salesforce.



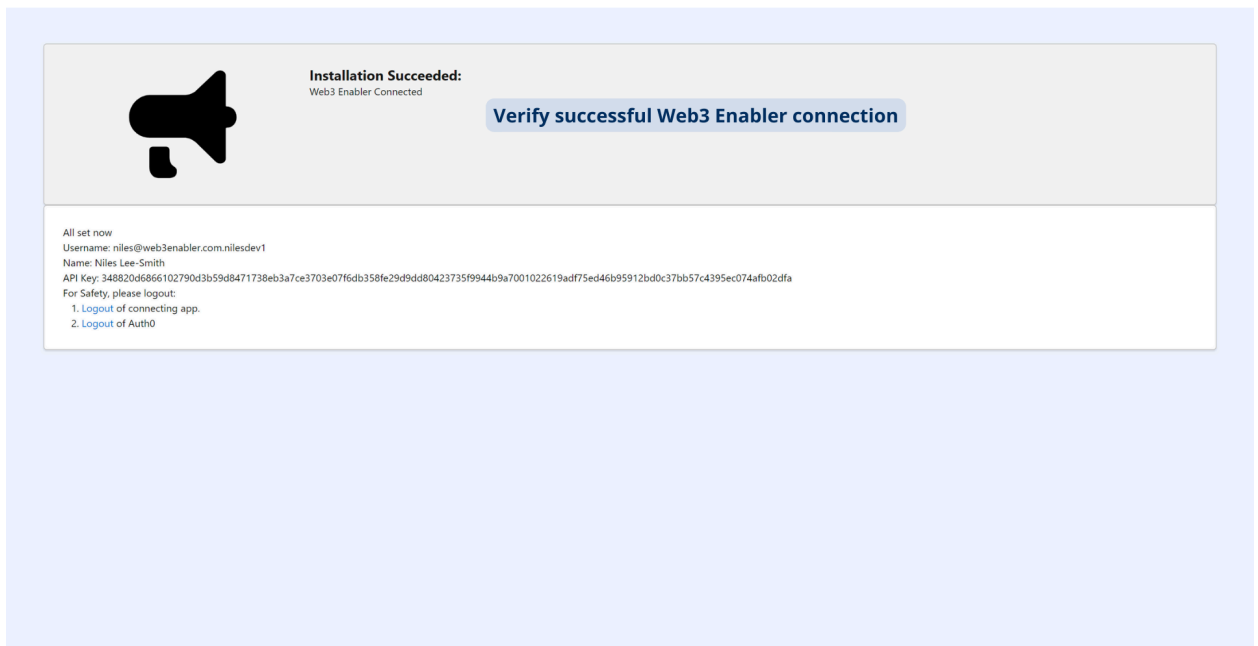
4. Log into Salesforce.



5. Click Allow.



6. View successful installation.



## Web3 Enabler Advanced Setup

Set up advanced configurations for your organization's Blockchain Payments app

## 1. Click Advanced Setup.

Sandbox: BCPdemo1 | Log out

Web3 Enabler Setup Post Install Manual Steps Setup **Advanced Setup** ← Click

**WARNING:** If you have not completed the Post Install Setup, the authorization will succeed, but you will get strange error messages and data will not flow properly. Please complete the Post Install Setup first.

### Web3 Enabler Setup

From this screen Web3 Enabler for Salesforce is Connected to the Web3 Enabler System

**Authorization Status**

Organization Information

Web 3 Enabler Organization Id	c53db806-628e-45e0-bb47-ca9db10c684f
Salesforce Organization Id	00DSu000000yle
Salesforce Organization URL	https://muknio--bcpdemo1.sandbox.my.salesforce.com
Web 3 Enabler API Key	Web 3 Enabler API Key is set
Authorized	✓

Connect to MuKn Web3 Enabler

Re-authorize My Org

Verify My Org

## 2. Click Reinitialize Asset Tokens and Reinitialize Contract Tokens and enter Coingecko API key.

Sandbox: NilesDev1 | Log out

Web3 Enabler Setup Post Install Manual Steps Setup **Advanced Setup**

### Web3 Enabler Advanced Setup

On this screen you can configure the advanced Web3 Enabler for Salesforce configuration

**Asset Tokens & Contract Tokens**

Reinitialize Asset Tokens & Contract Tokens

If Asset Tokens or Contract Tokens records have been deleted/changed, you can refresh them.

Reinitialize Asset Tokens ← 1. Click

Reinitialize Contract Tokens ← 2. Click

**CoinGecko Pro Setup**

CoinGecko Pro Credentials

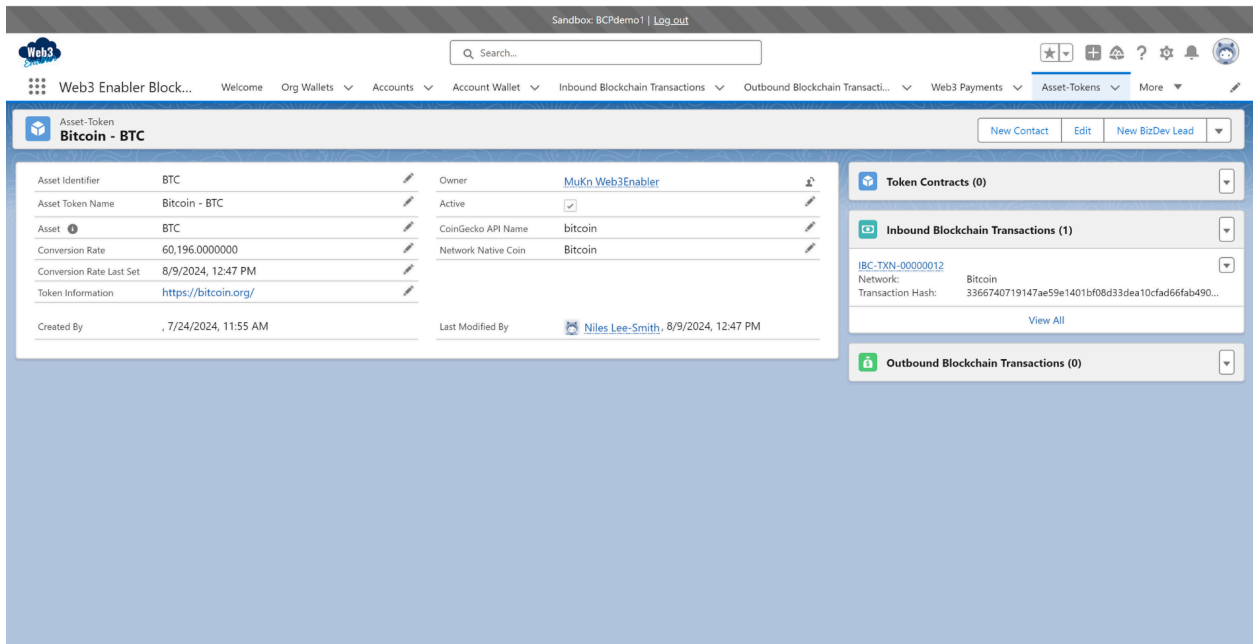
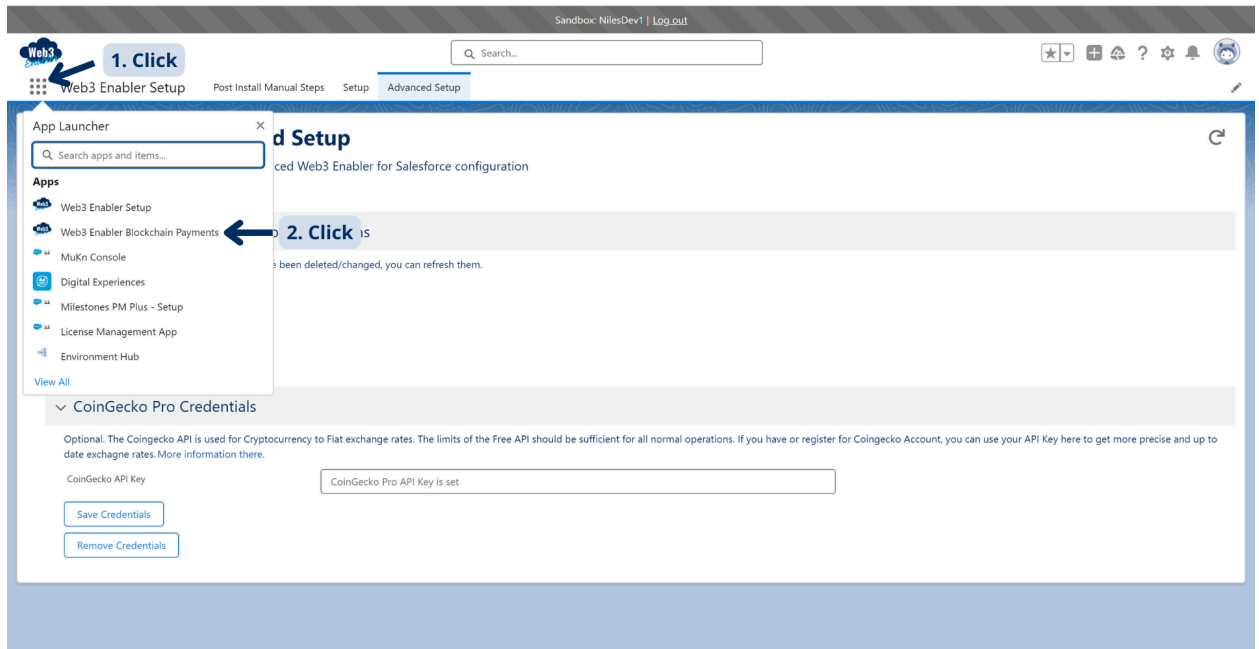
Optional. The Coingecko API is used for Cryptocurrency to Fiat exchange rates. The limits of the Free API should be sufficient for all normal operations. If you have or register for Coingecko Account, you can use your API Key here to get more precise and up to date exchange rates. More information there.

CoinGecko API Key CG-aDP4E1P7byT2zXY52EydGGrQ ← 3. (Optional) Enter CoinGecko API Key

Save Credentials ← 4. (Dependent on 3) Click

Remove Credentials

### 3. Go to Web3 Enabler Blockchain Payments.



# Salesforce Admin Primer on Cryptocurrencies

Many Salesforce Admins may only have a cursory understanding of cryptocurrencies and digital assets when asked to embark on this process. This primer is designed to provide some basic terminology and understanding.

## Definitions

**Blockchain** - A distributed ledger (series of transactions) stored in data elements called blocks. These blocks contain references to the prior blocks, creating a “chain” of data. The blockchain costs resources to maintain. The maintainers are compensated for validating or mining.

**Coin** - The native digital asset of a blockchain. It is used to pay for transactions (often called gas in Ethereum based systems). It is received as a reward for “mining” or “validating” data on the blockchain. Famous coins include Bitcoin (BTC), Ethereum (ETH), and Dogecoin (DOGE).

**Fiat** - Originally a term to separate currencies no longer backed by gold, it is used in the Web3 community to refer to currencies issued by central banks (i.e. US Dollars, Euros, Pounds, Yen).

**Mining / Proof of Work** - The process of maintaining and verifying blockchain operations generates small rewards for those doing the calculations. This is called “mining” and is done with a cryptographically complex operation. That “work” receives compensation, creating the correct incentives.

**Stablecoin** - A digital token that is “pegged” to an existing financial instrument, commonly US Dollars, Euros, or other major currencies. High quality stablecoins make conversion to fiat easy. Popular Stablecoins include (USDT, USDC, EURS).

**Token** - A non-native digital asset. The media talks about NFTs (non-fungible tokens) and cryptocurrencies (fungible tokens). Most financial digital assets are these tokens.

**Transaction** - An entry on the blockchain

**Validating / Proof of Stake** - The validators track the information. They prove their economic incentives by having proof of a “stake” of the coins from the blockchain.

## Best Practices

### Initial Cryptocurrency Rollout - Stablecoins

Web3 Enabler abstracts the differences between digital assets and wallets from end users. The distinction between Coins and Tokens is technologically significant but economically irrelevant. Web3 Enabler maps all transactions to “Asset-Tokens”, which include both digital asset types.

For initial use, we recommend only accepting Stablecoins in the currency or currencies you already use. This simplifies your business process.

For example, a US based company that only works in dollars should disable all currencies except USDT and USDC. You should accept those tokens at a conversion rate of 1.

A multinational firm running multicurrency in Salesforce that does business in Europe, US, and UK, should enable:

- USDC and USDT with a conversion rate of 1 USD

- EURT, EURS, and EUROC with a conversion rate of 1 EUR

- GBPT with a conversion rate of 1 GBP

Work with your Accounting/Finance team to set up one or more Web3 EVM Wallet that will accept all these tokens, and develop your offramp strategy to convert to fiat.

### More Cryptonative: Popular Major Coins

Develop a conversion strategy for popular coins like Bitcoin (BTC), Ethereum (ETH), including off-ramping. More aggressively, accept close Bitcoin derivatives like Dogecoin (DOGE), Litecoin (LTC), and Dash (DASH). Your strategy involves how you mark the payments to market and set conversion rates.

Integration with the Bitcoin, Dogecoin, Litecoin, and Dash blockchains is planned for v2.0.