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 sers 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'.

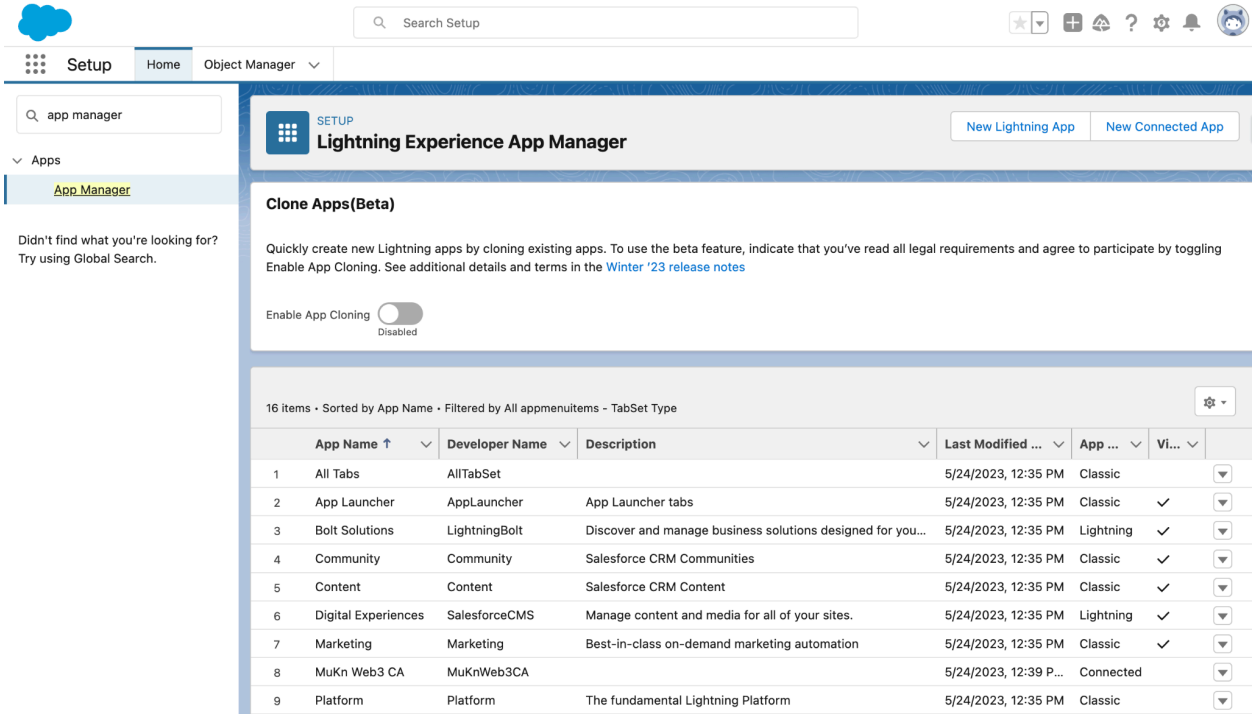
2. Create a new Permission Set named 'Web3 Enabler Accounts Access' with license 'Salesforce API Integration'.
    a. Choose Object Settings, Accounts, Check: View All, Modify All.
3. Assign to the integration user.

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).

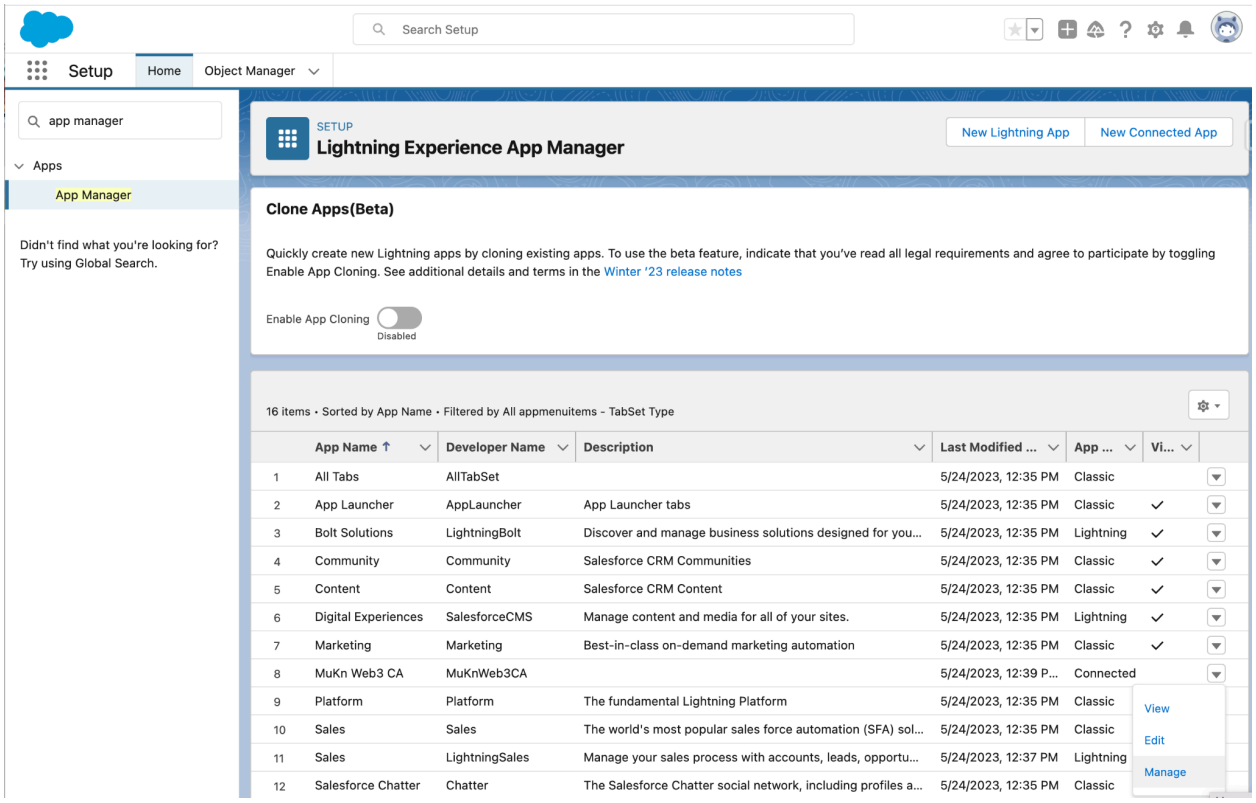
2. In App Selection, choose “Web3 Enabler Setup”.
3. Authorize my Organization - It is recommended that you use an Incognito/Private Browser.
4. As the User from Step 1, Login, authenticating your user information.

Installation Screenshots

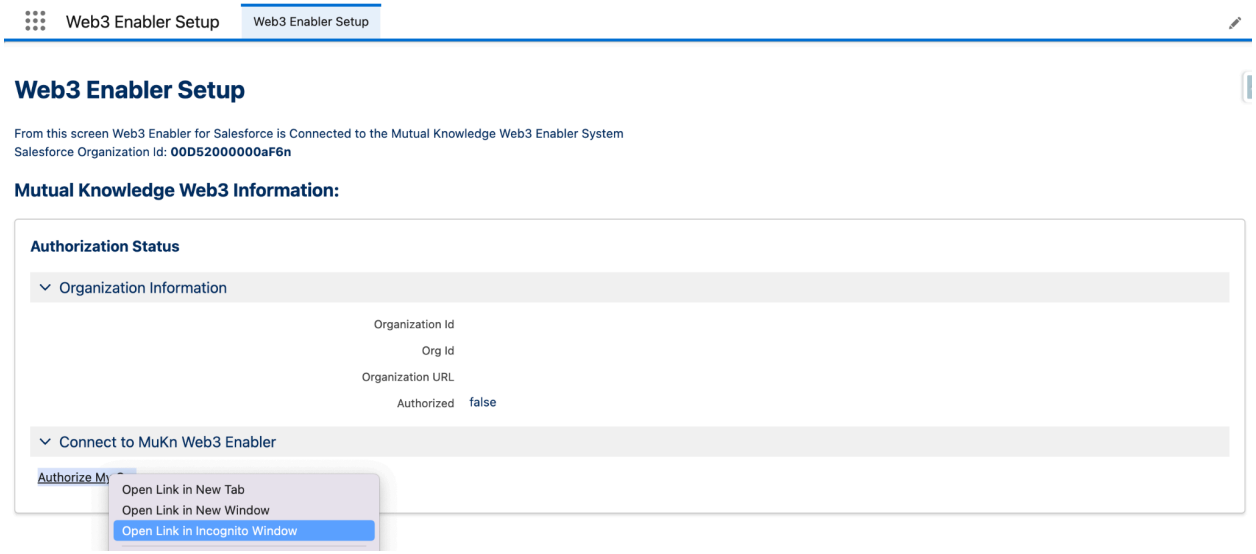
Screenshot 1: Go to App Manager in Setup



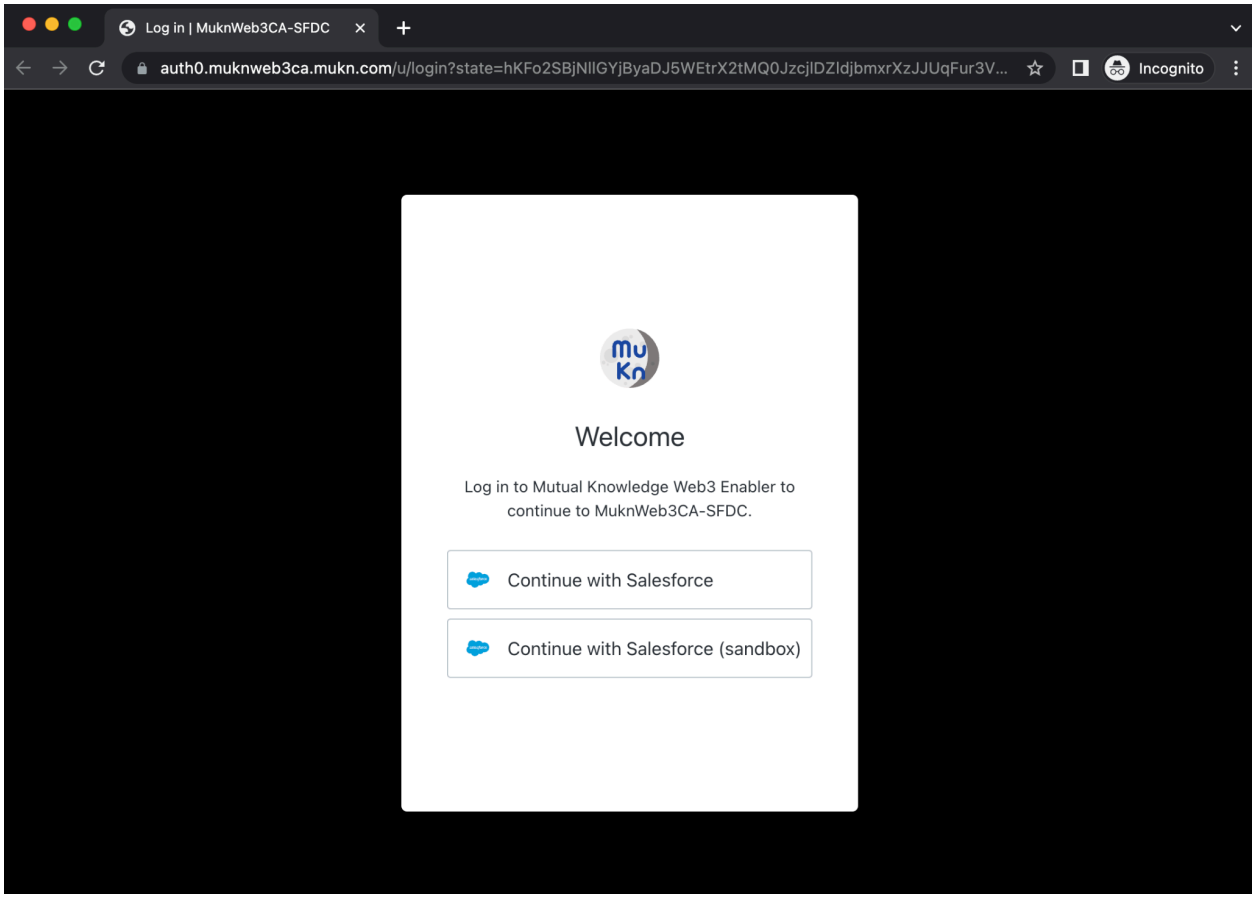
Screenshot 2: Choose Manage for MuKn Web3 CA



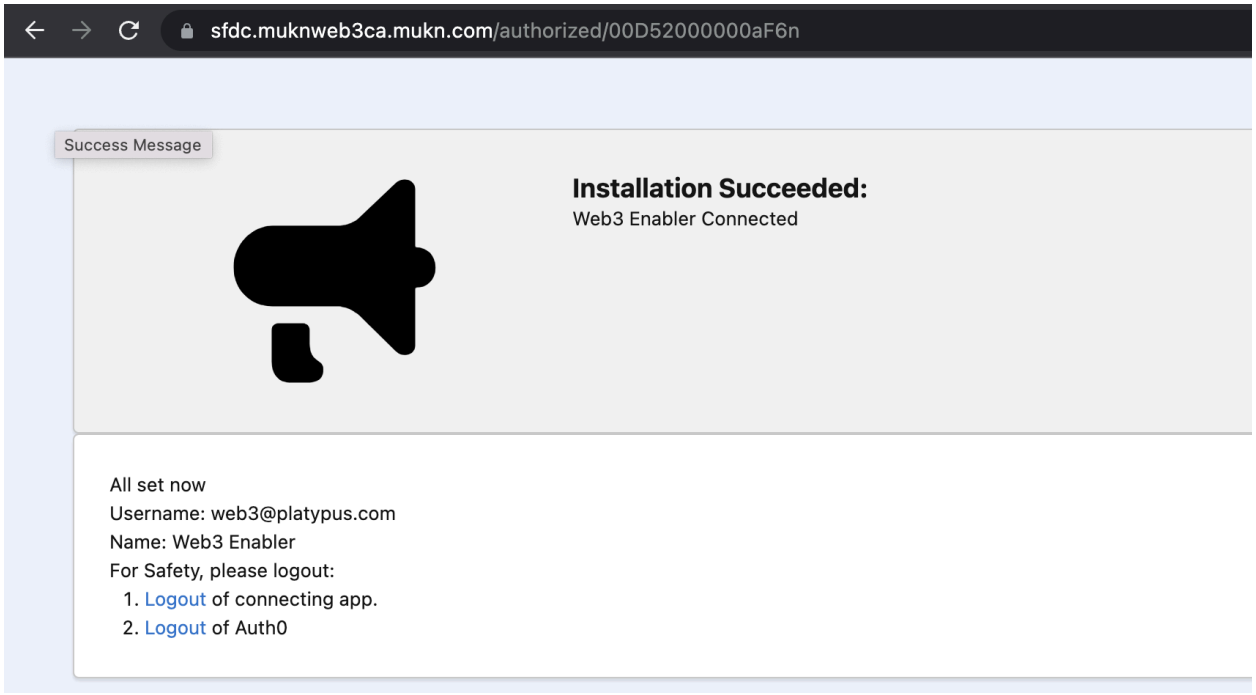
Screenshot 3: Go to Web3 Enabler Setup, Authorize in Private / Incognito Window



Screenshot 4: Login with either Standard or Sandbox Login

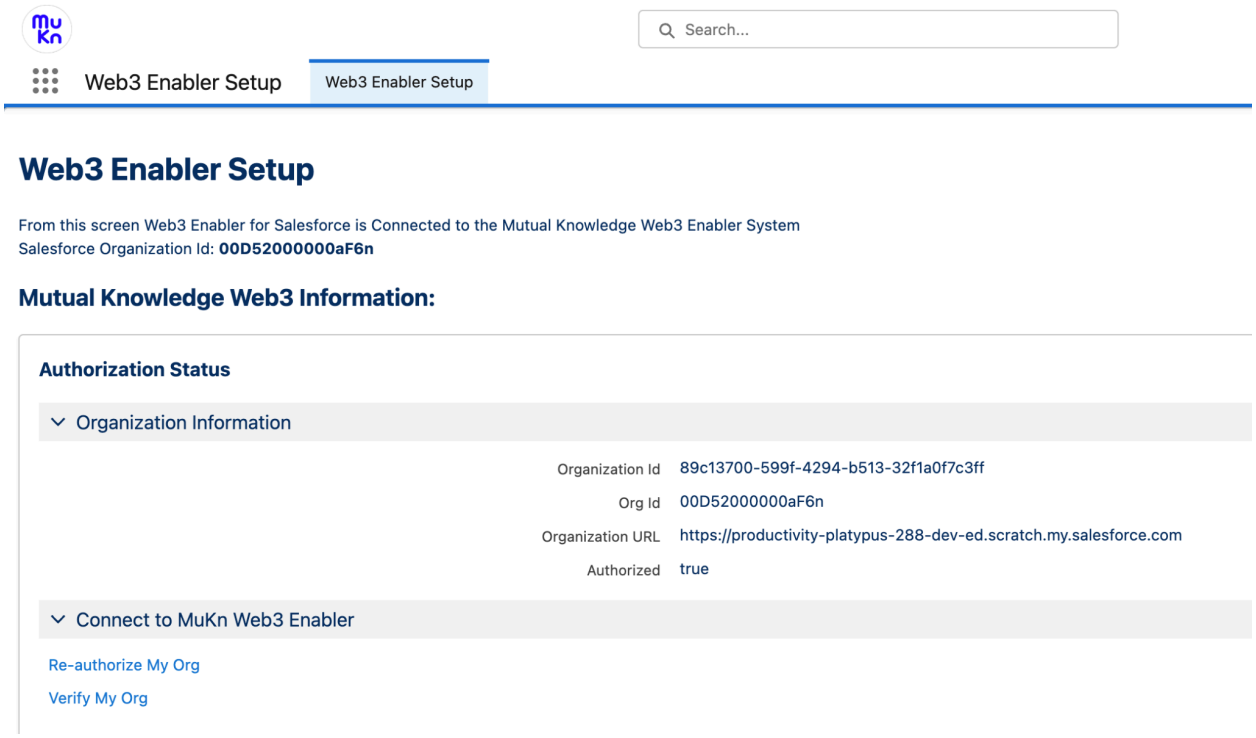


Screenshot 5: Grant any requested access and finish



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



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.

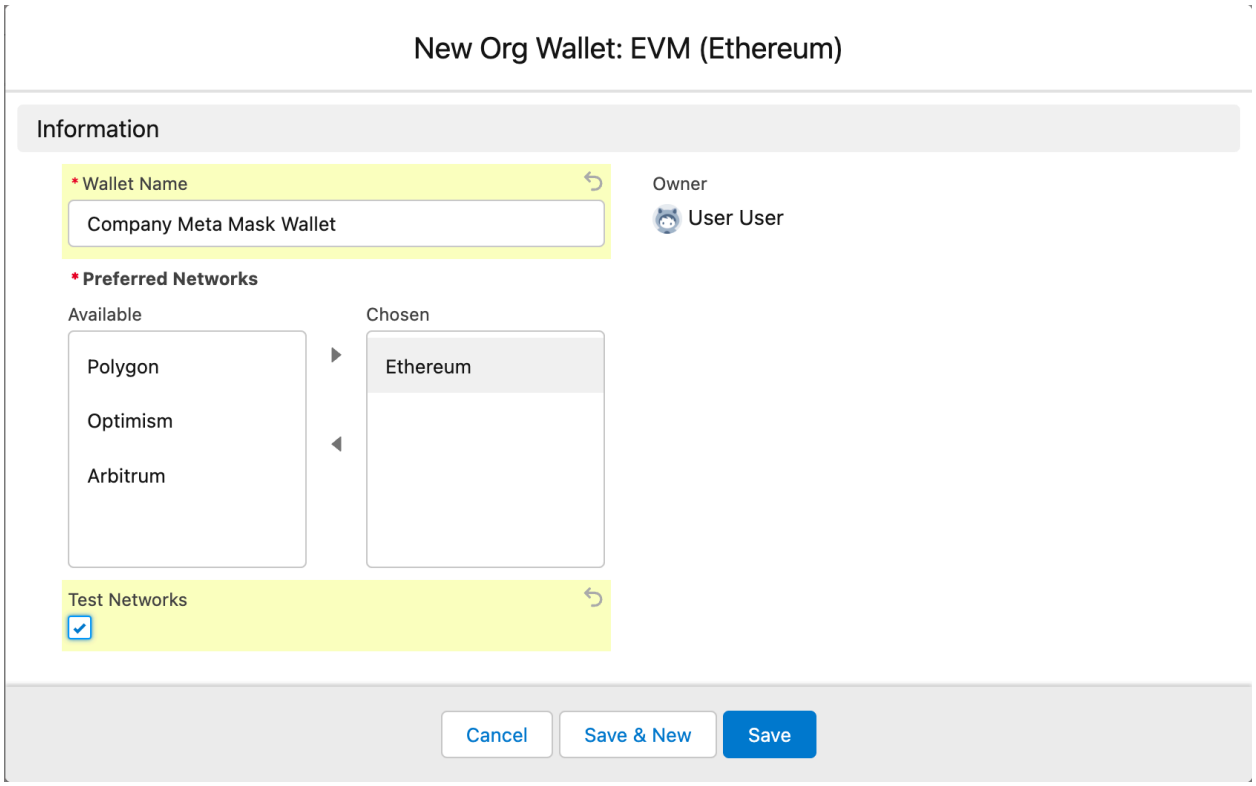
Depending on data needed, a Platform or Full license is required for the Accountant User.

Configuring a Organization Wallet

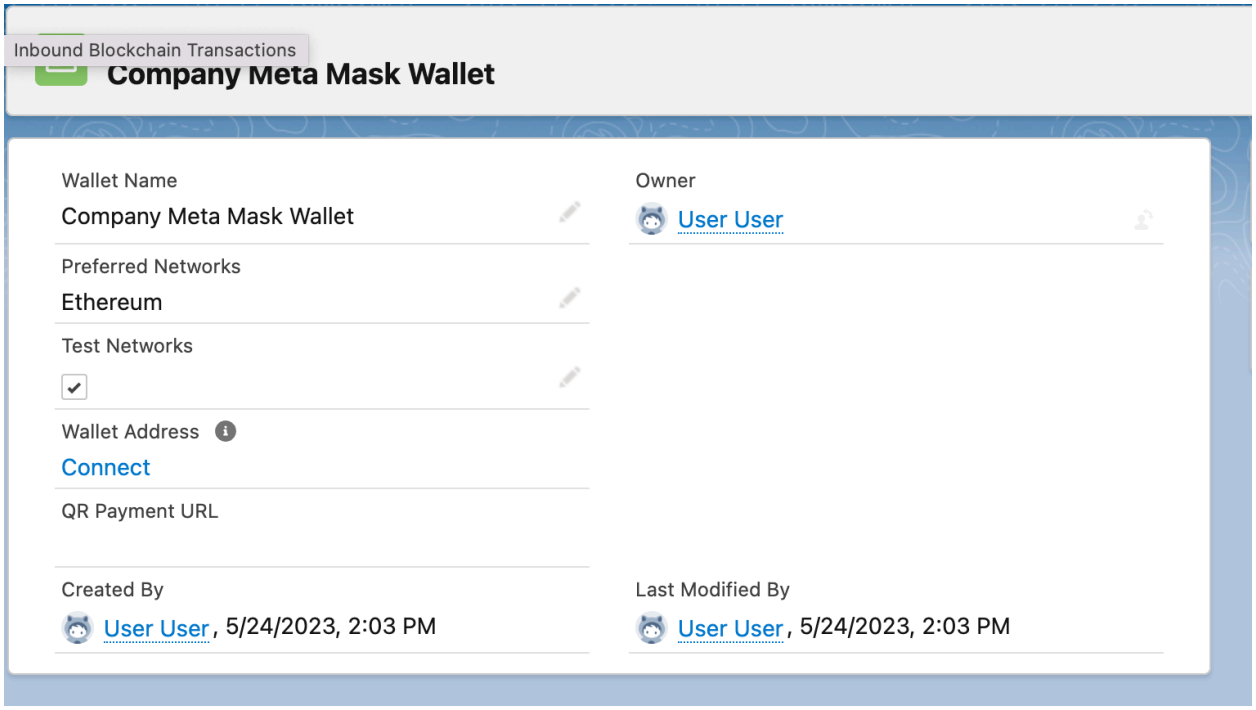
Create a new Org Wallet. Use an easy to remember name that will help you track your wallet. If you would like to test the functionality with TestNet transactions, then enable Test Networks. Remember to disable this when you are done testing.

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.



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

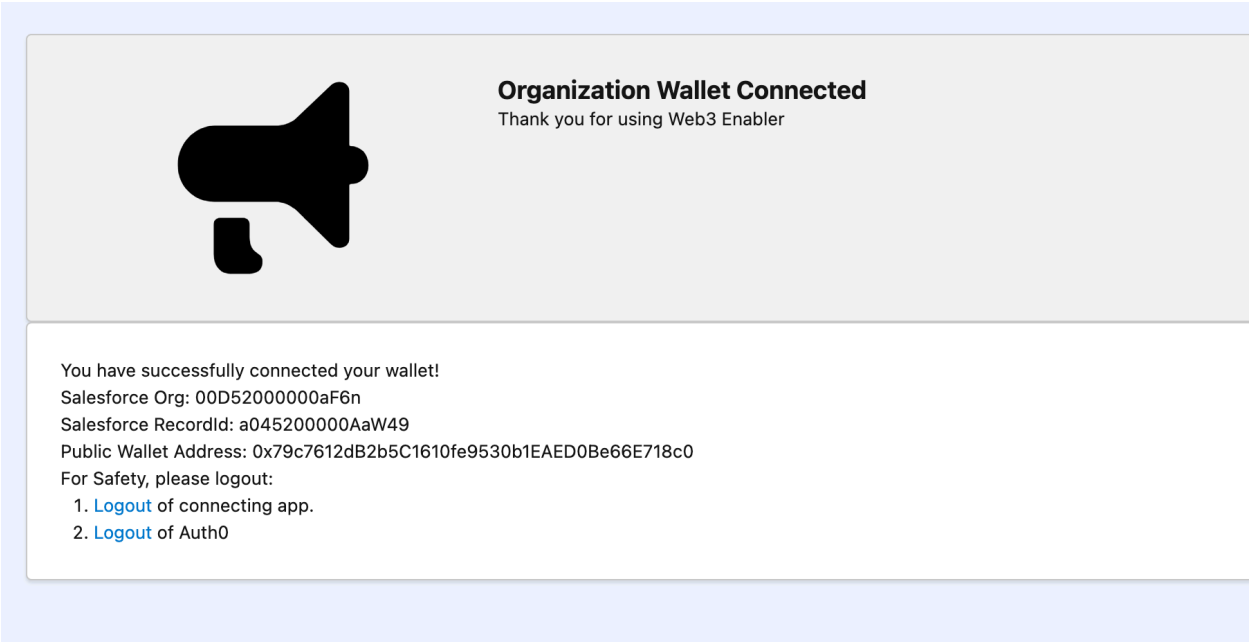


If you have your wallet in your browser, just click on the Connect Link. If you are planning to use a Phone based or other external wallet, it is recommended that you right click on Connect and choose Incognito or Private Browser.

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

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

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

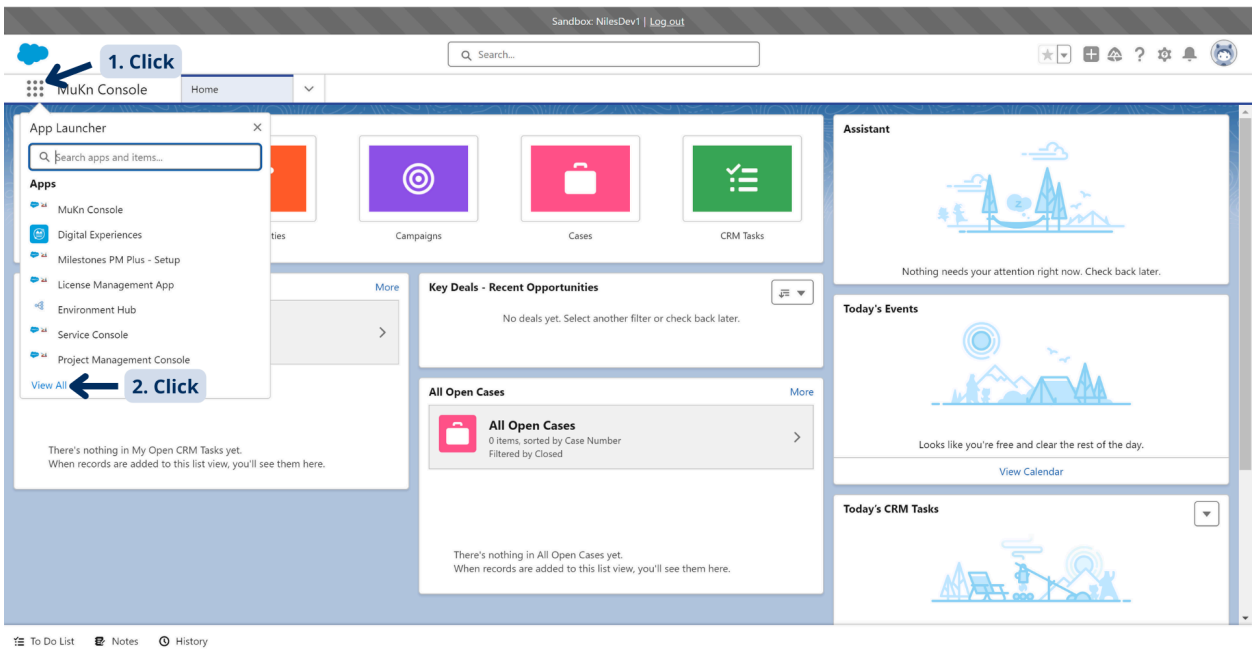


Refresh your Salesforce Page and your Wallet Address will now be visible and your QR Payment link will be available.

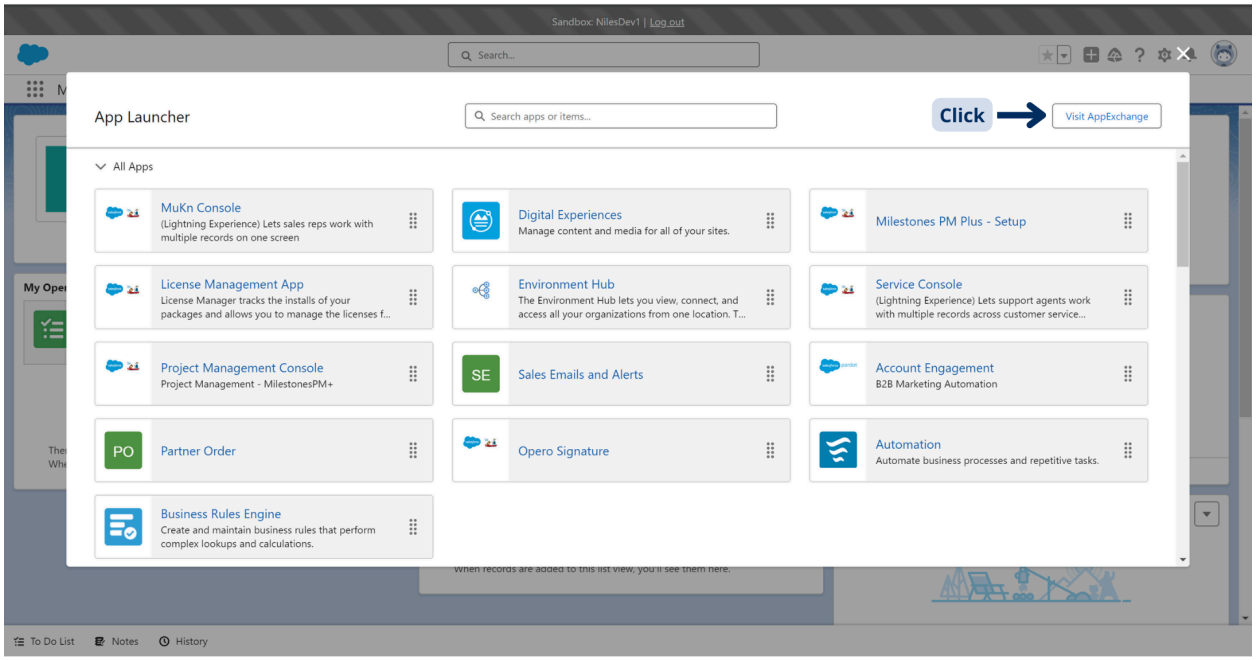
Install Web3 Enabler Blockchain Payments

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

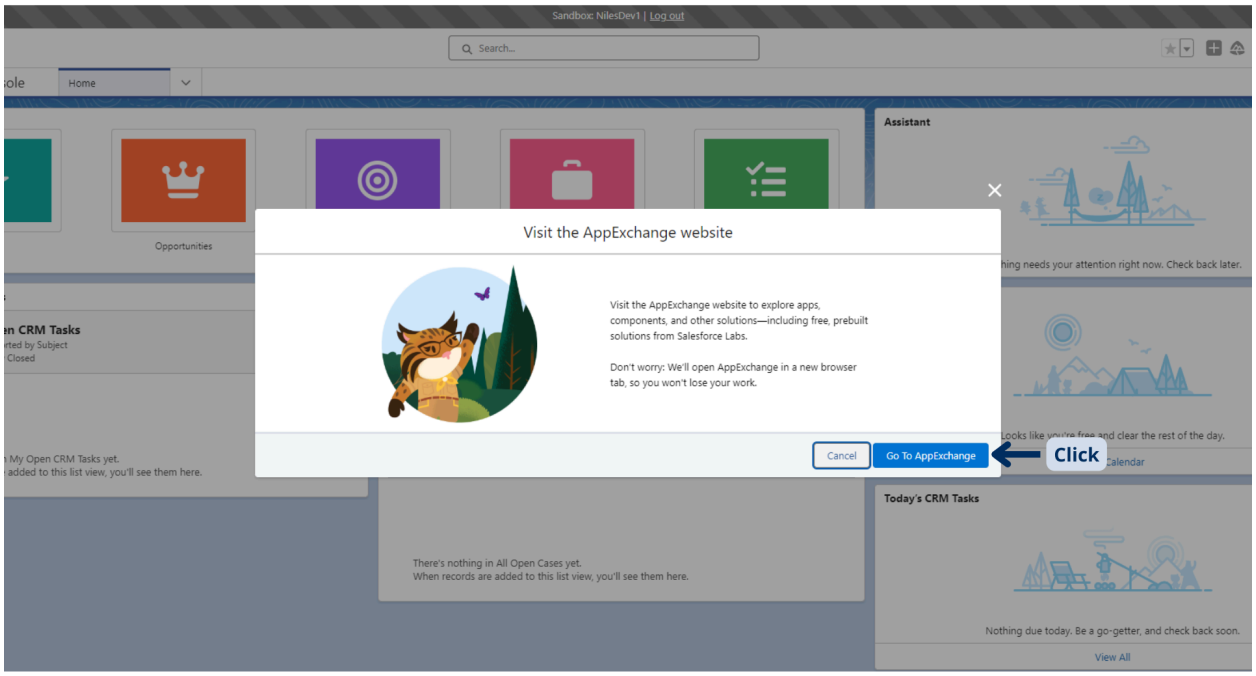
1. Open Salesforce App Launcher.



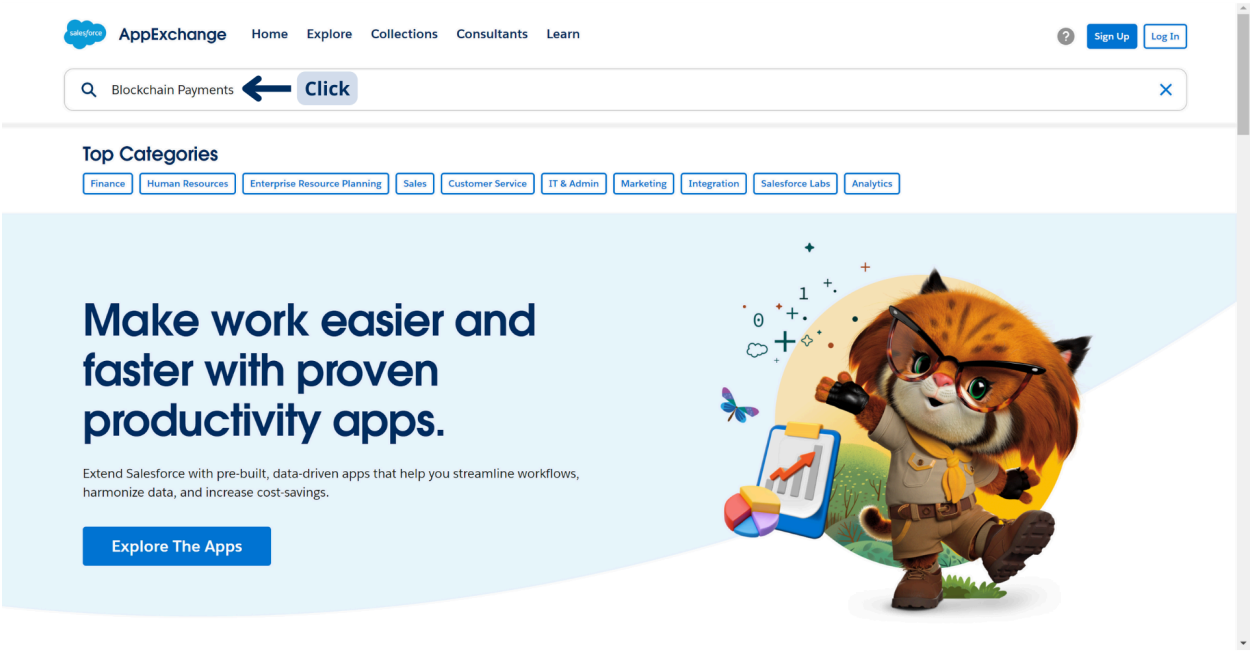
2. Click Visit AppExchange.



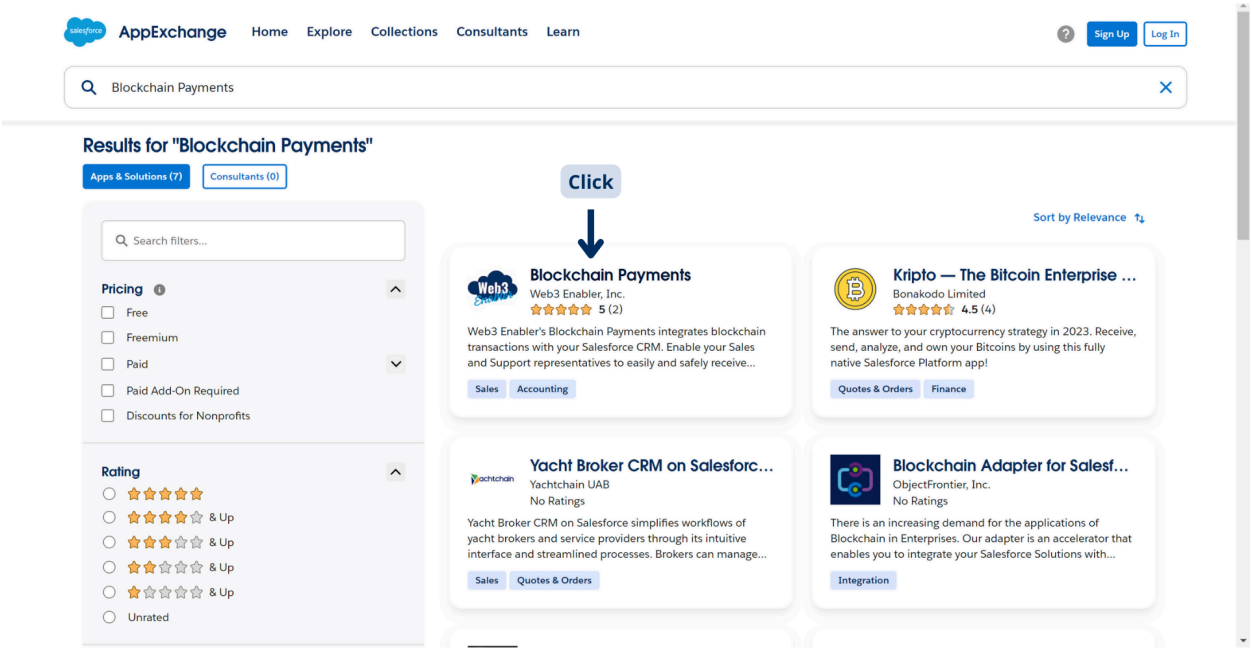
3. Click Go To AppExchange.



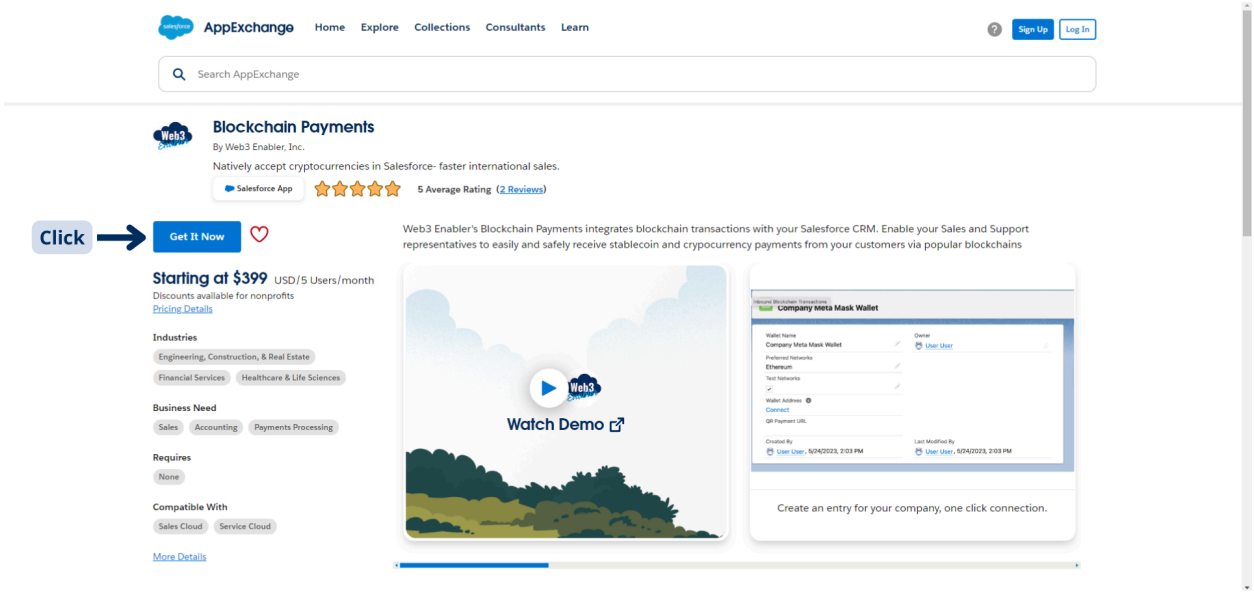
4. Search for Blockchain Payments on Salesforce AppExchange.



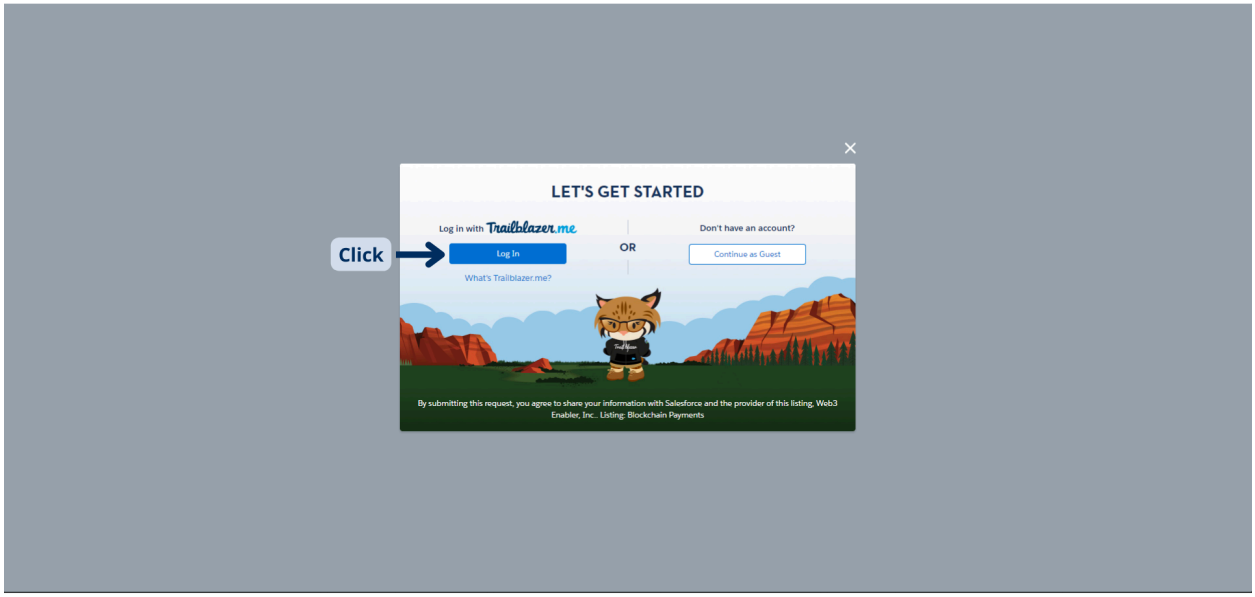
5. Select Blockchain Payments application on Salesforce AppExchange.



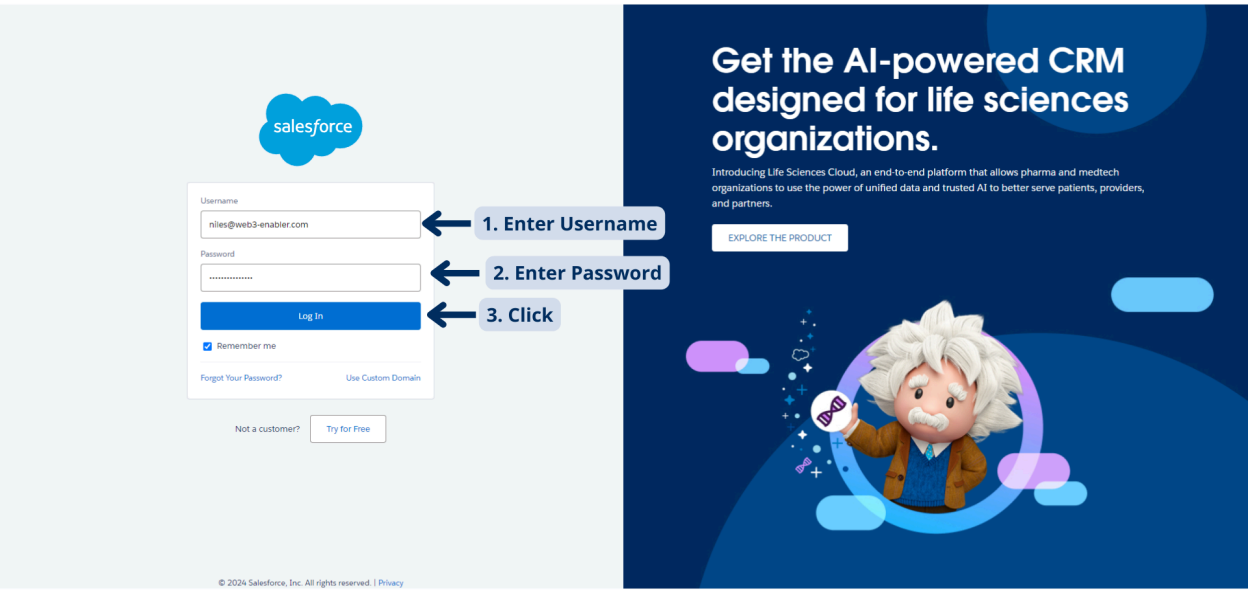
6. Click Get It Now.



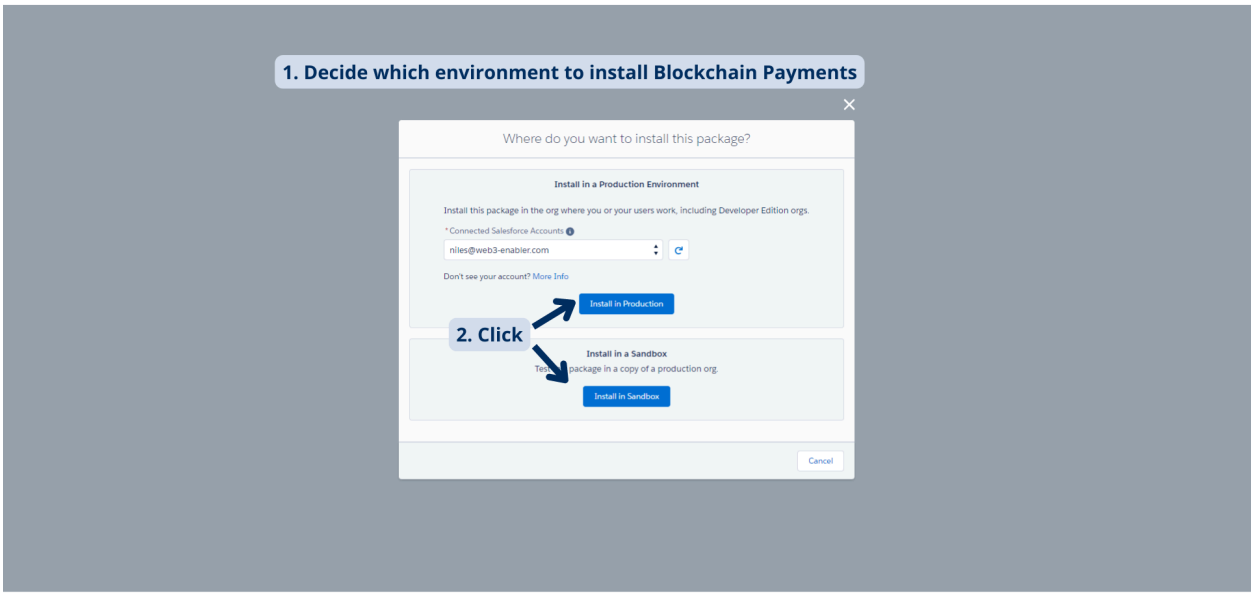
7. Click Log In.



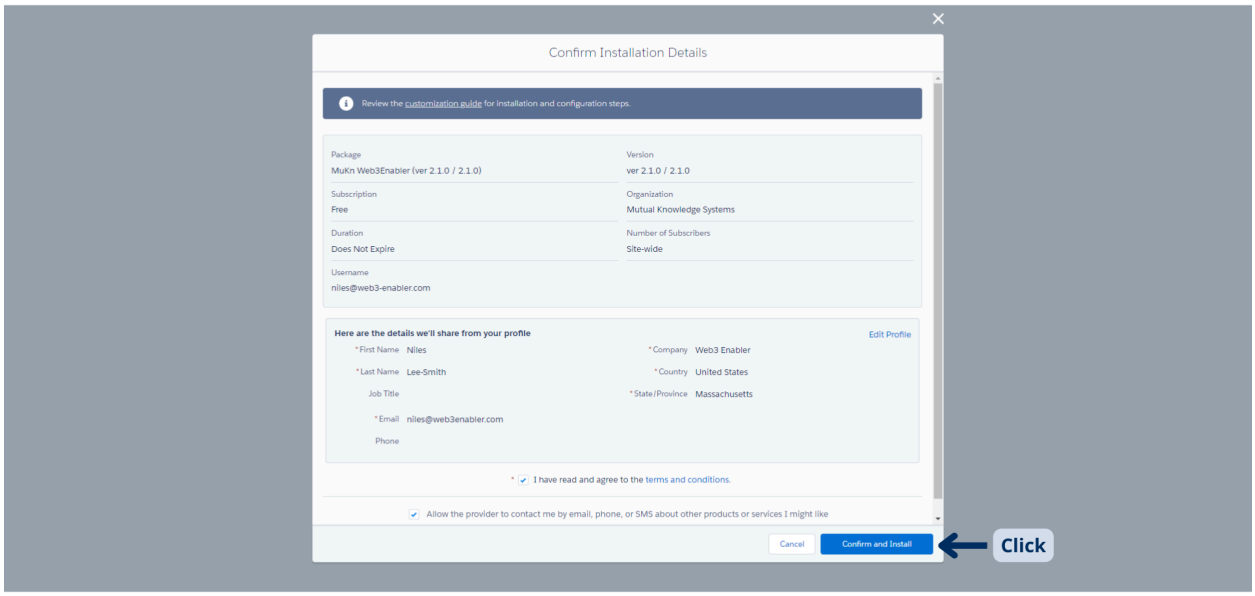
8. Log in to your Salesforce account.



9. Click Install in Production or Install in Sandbox.

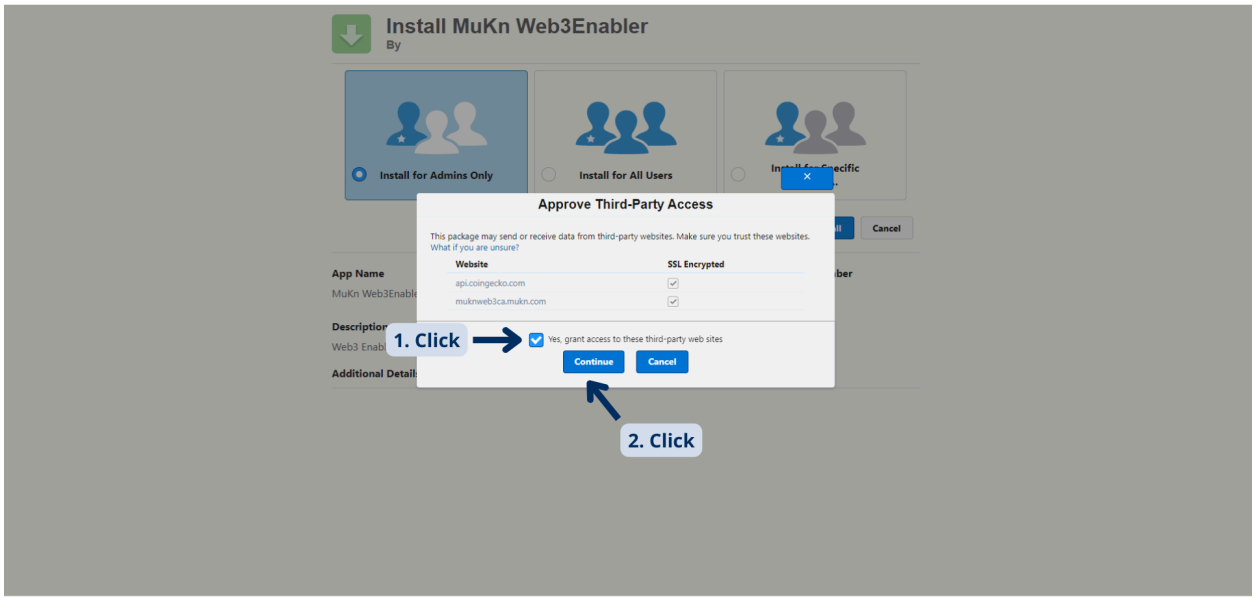


10. Click Confirm and Install.

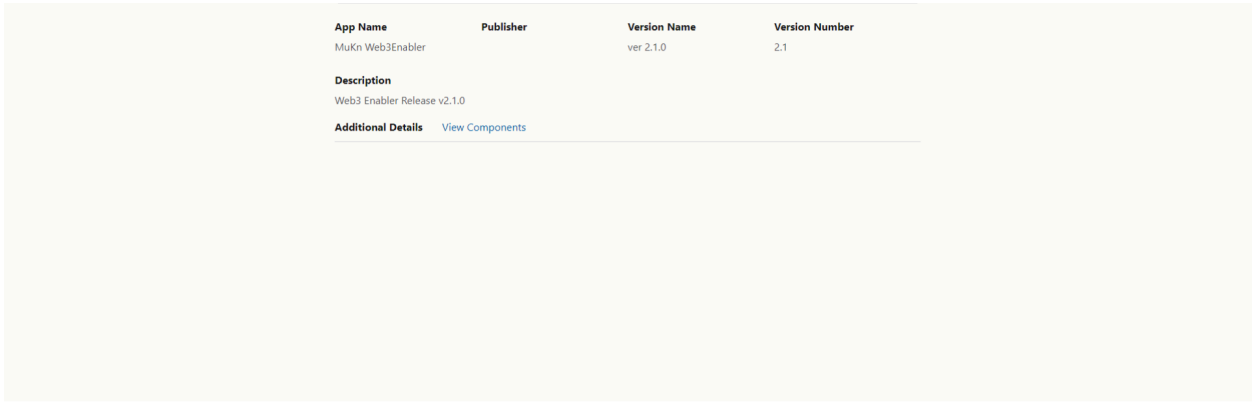


11. Click Install.

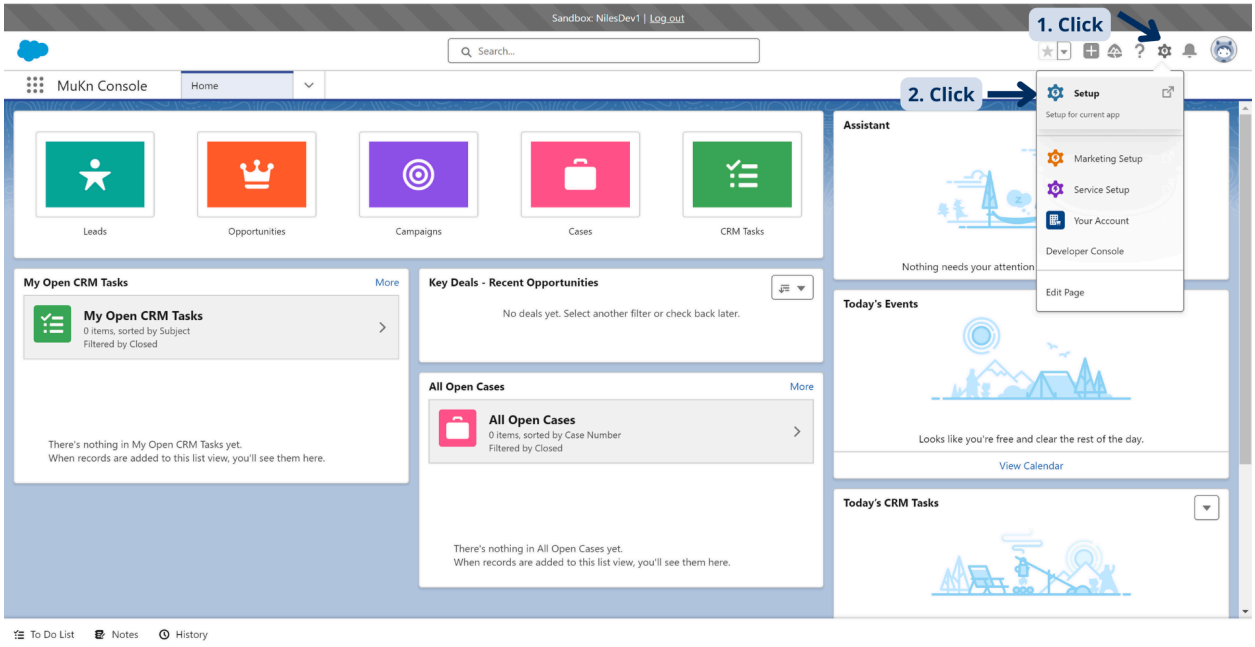
12. Accept and click Continue.



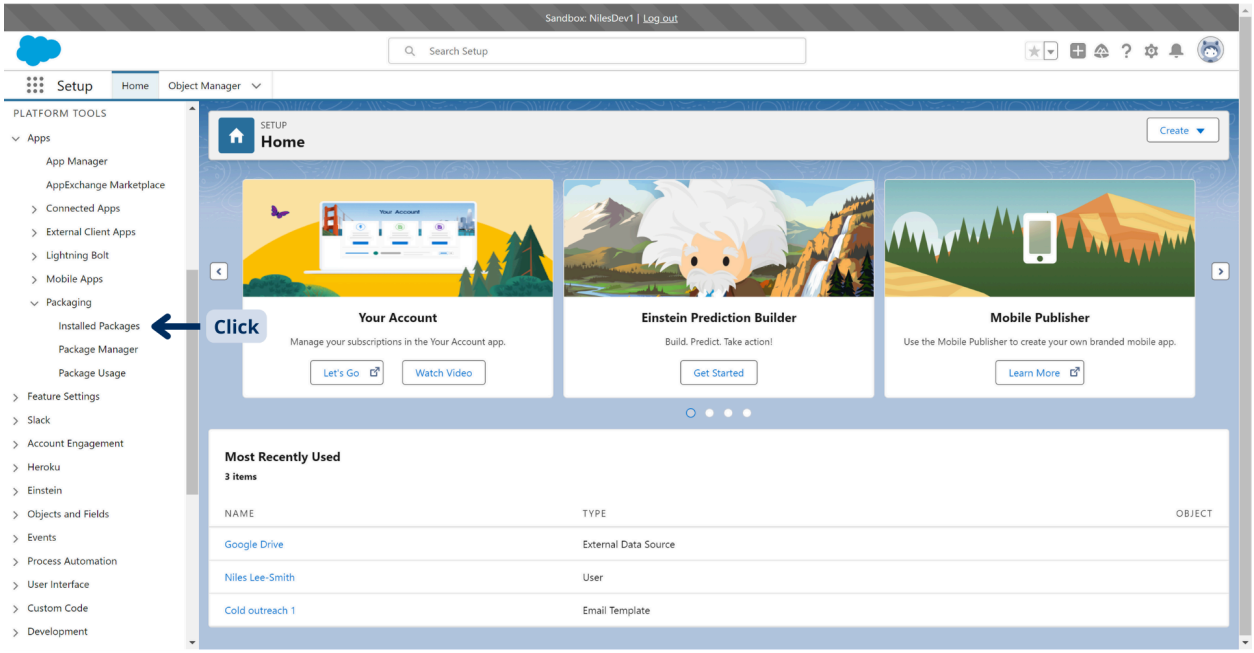
13. Verify installation of Blockchain Payments has started.



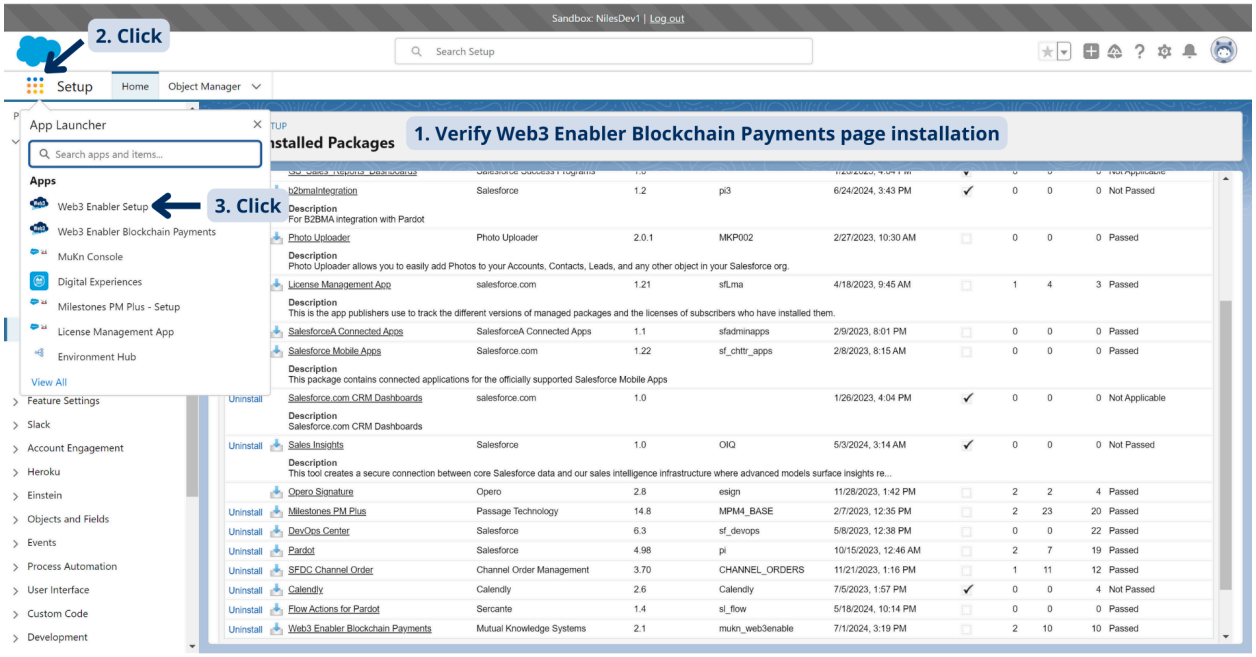
14. Go to Salesforce and click Setup.



15. Click Installed Packages.



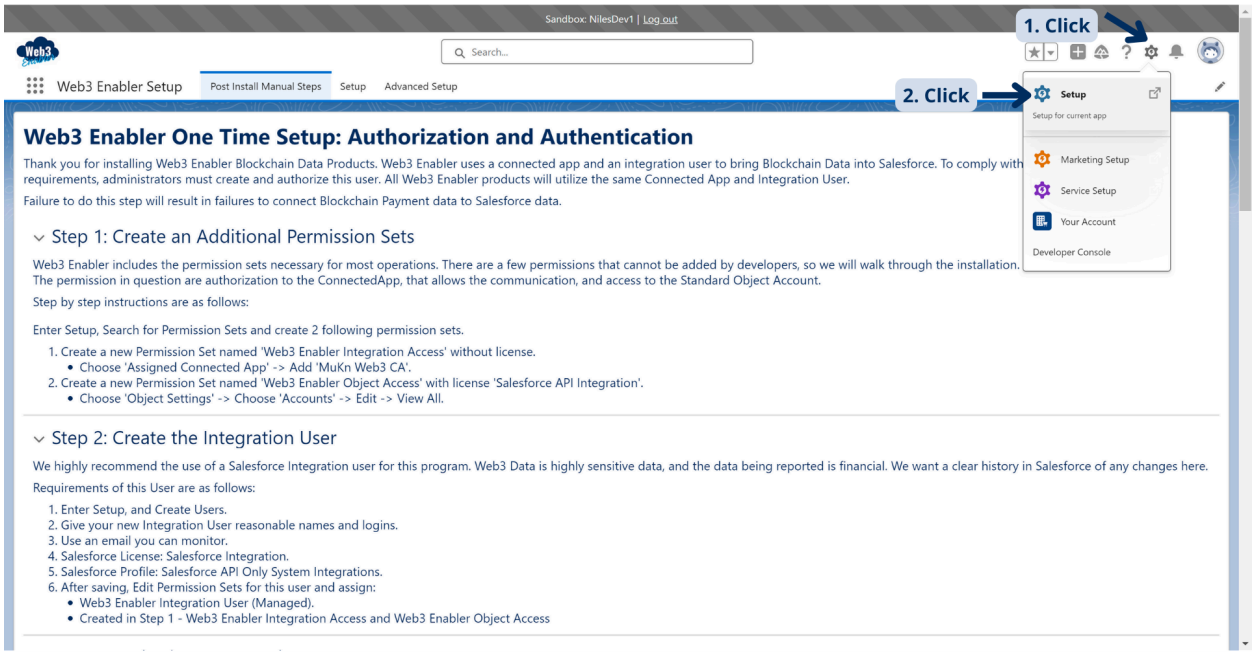
16. Verify Blockchain Payments has been installed and go to Web3 Enabler Setup.



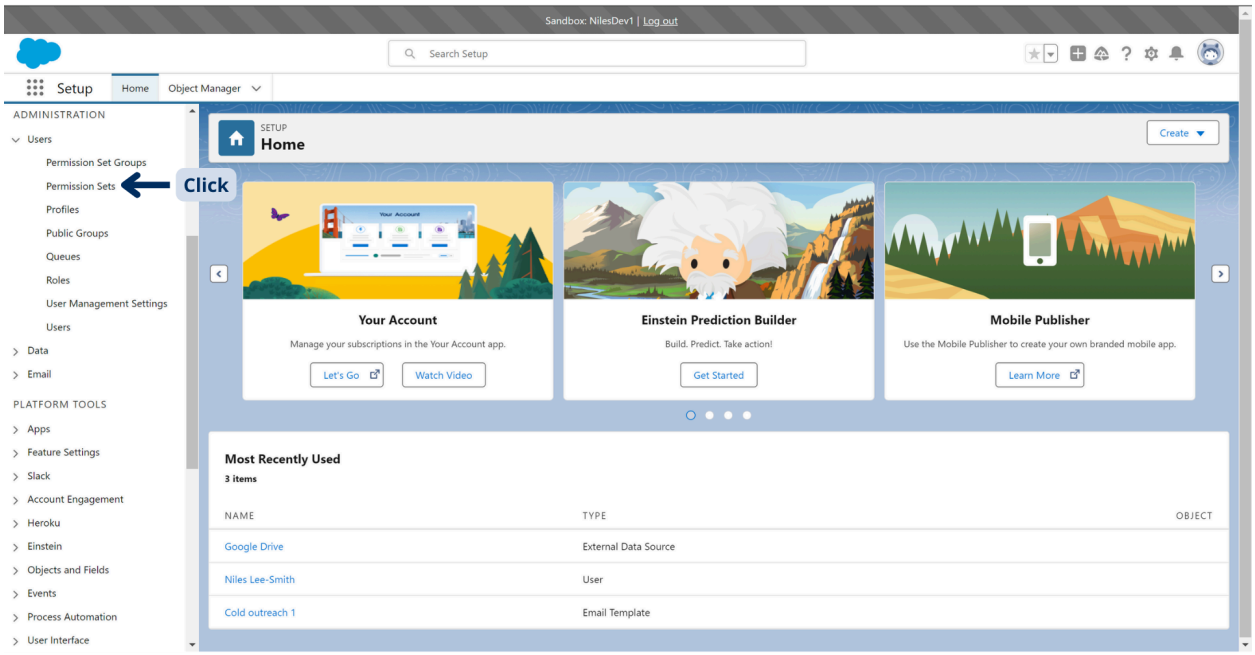
Create Additional Permissions Sets

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

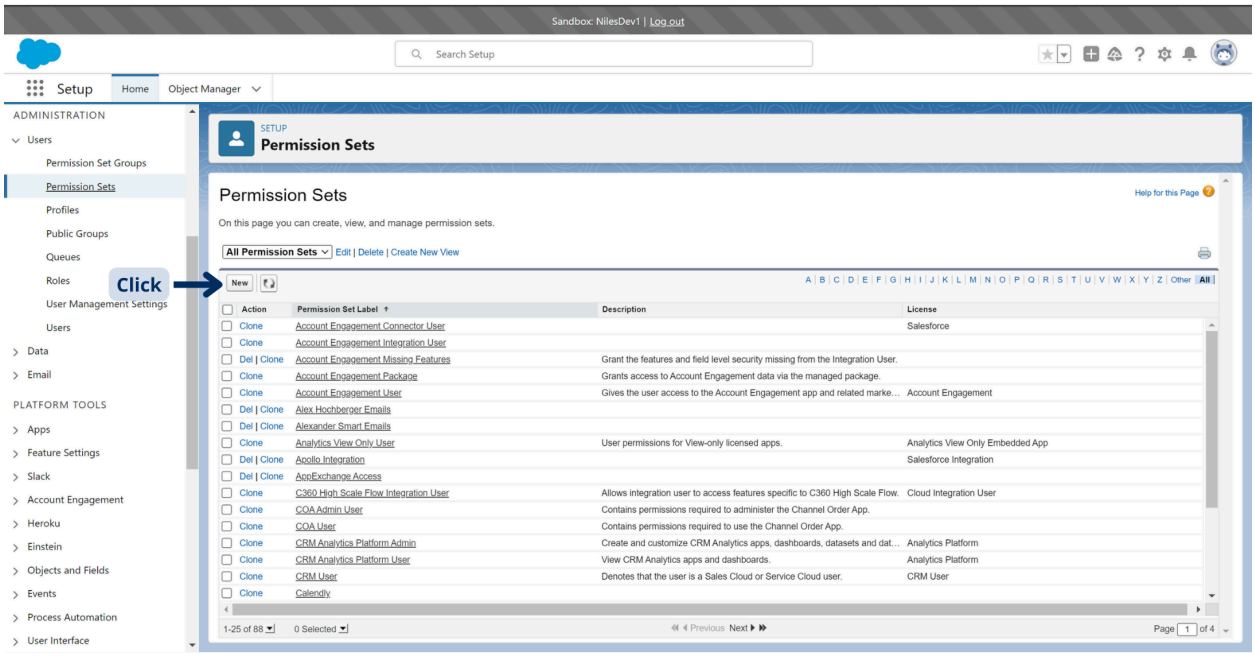
1. Click Setup.



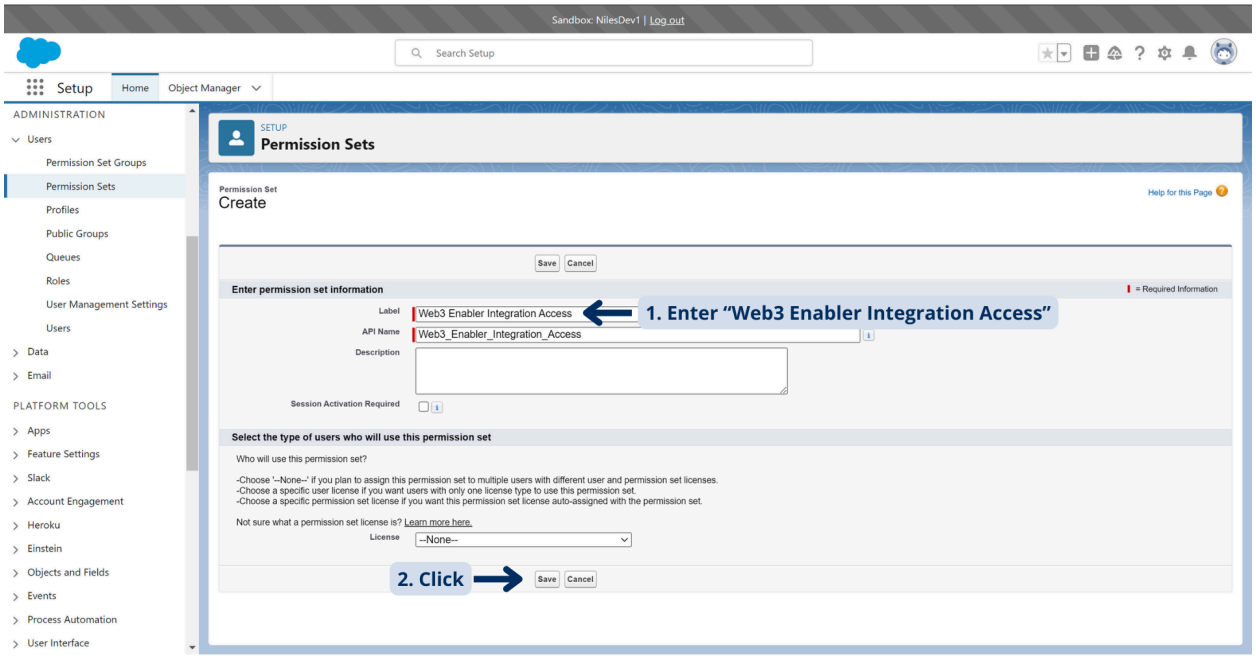
2. Click Permission Sets.



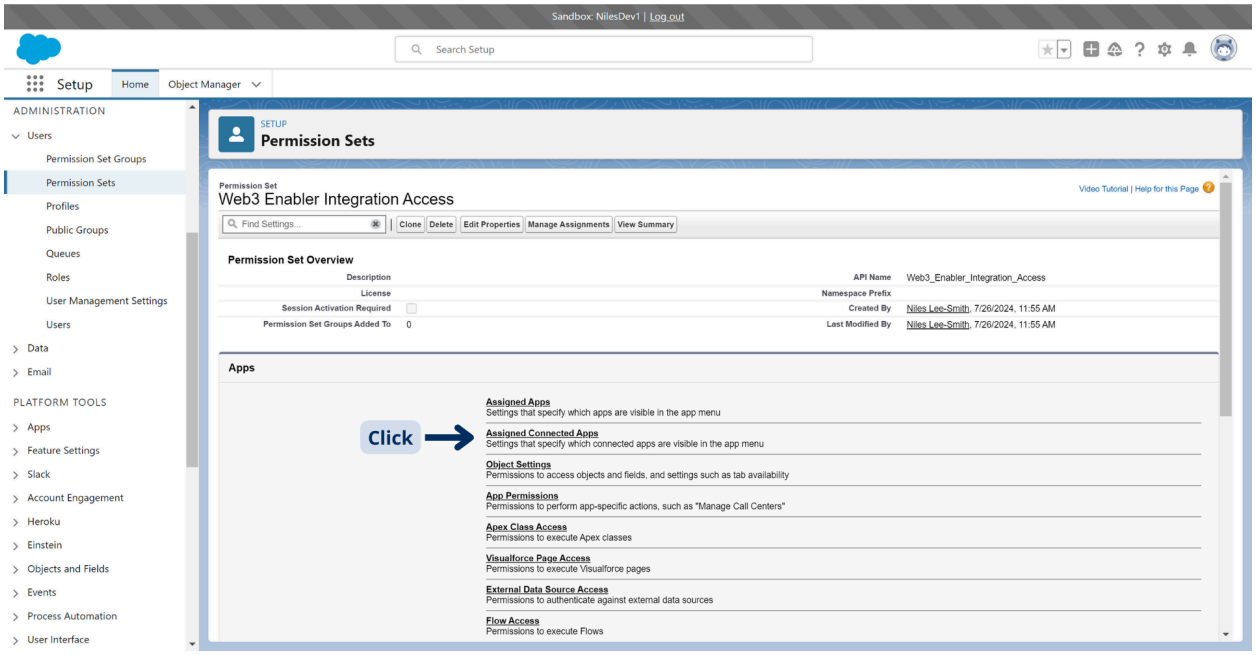
3. Click New.



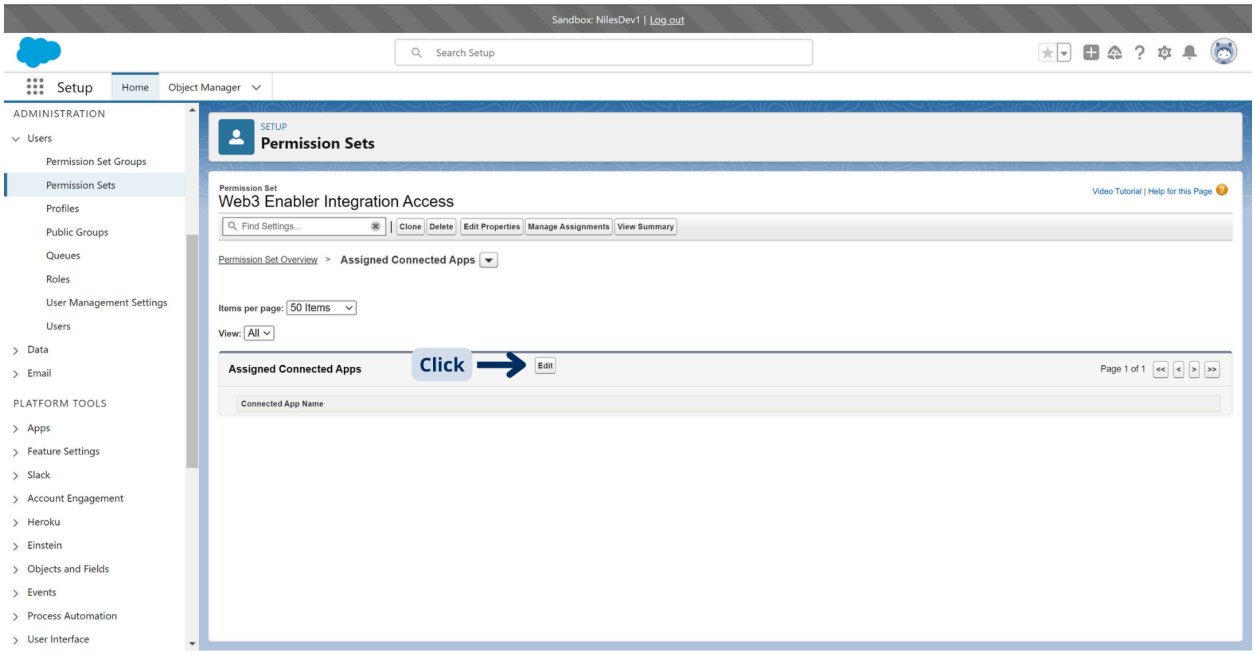
4. Create and save Web3 Enabler Integration Access Permission Set.



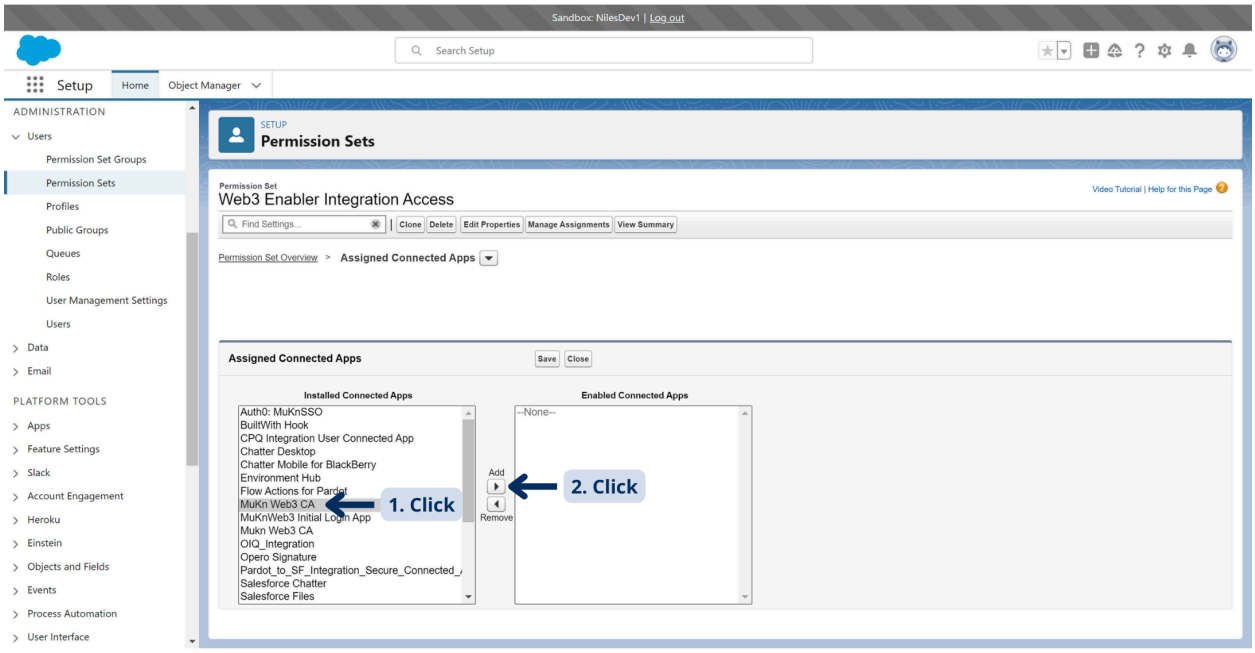
5. View Web3 Enabler Integration Access Permission Set and click Assigned Connected Apps.



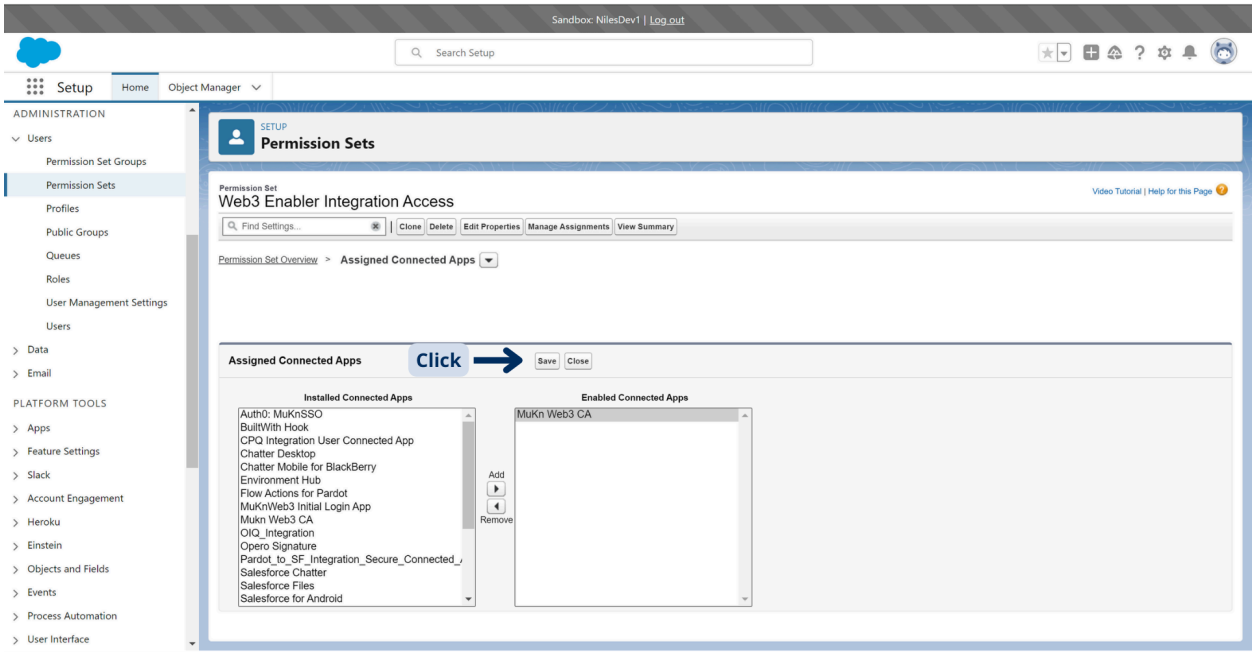
6. Click Edit.



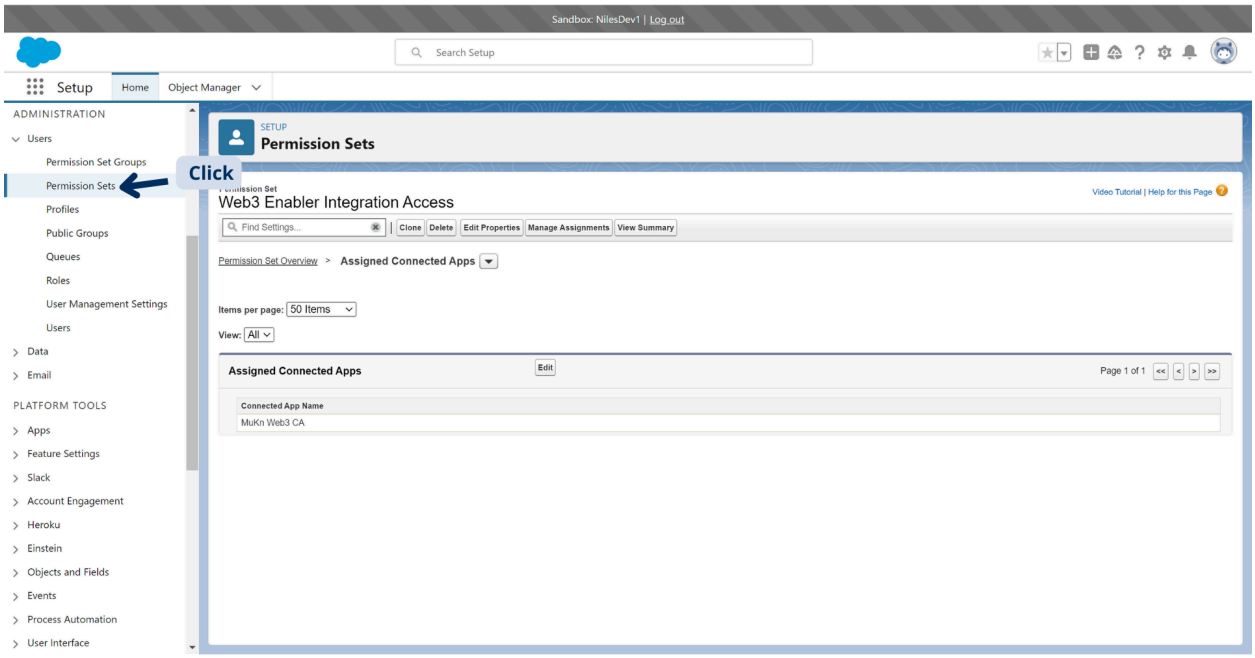
7. Select MuKn Web3 CA and click Add.



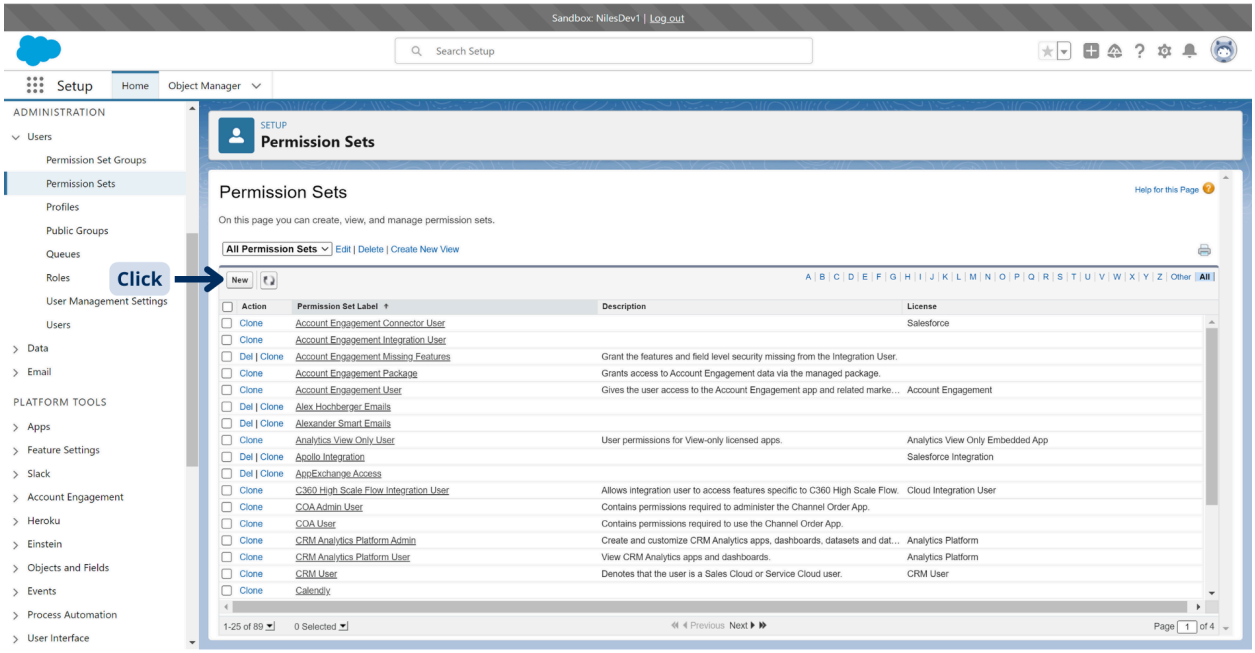
8. Click Save.



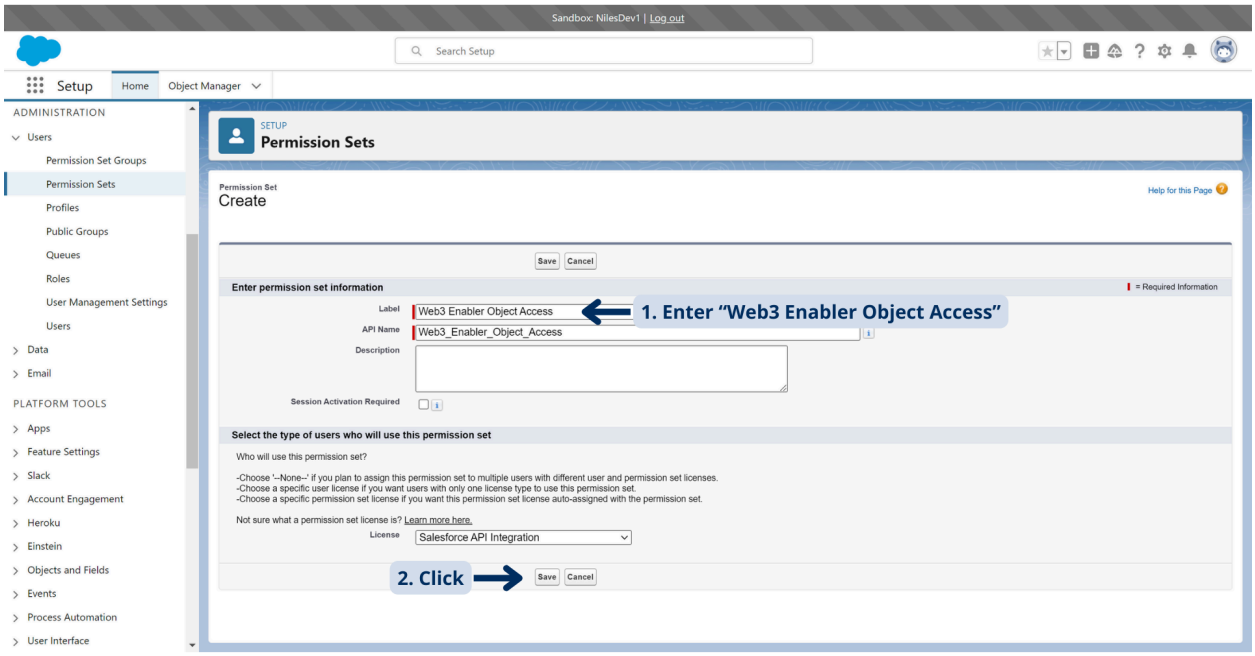
9. View Web3 Enabler Integration Access and Assigned Connected Apps and click Permission Sets.



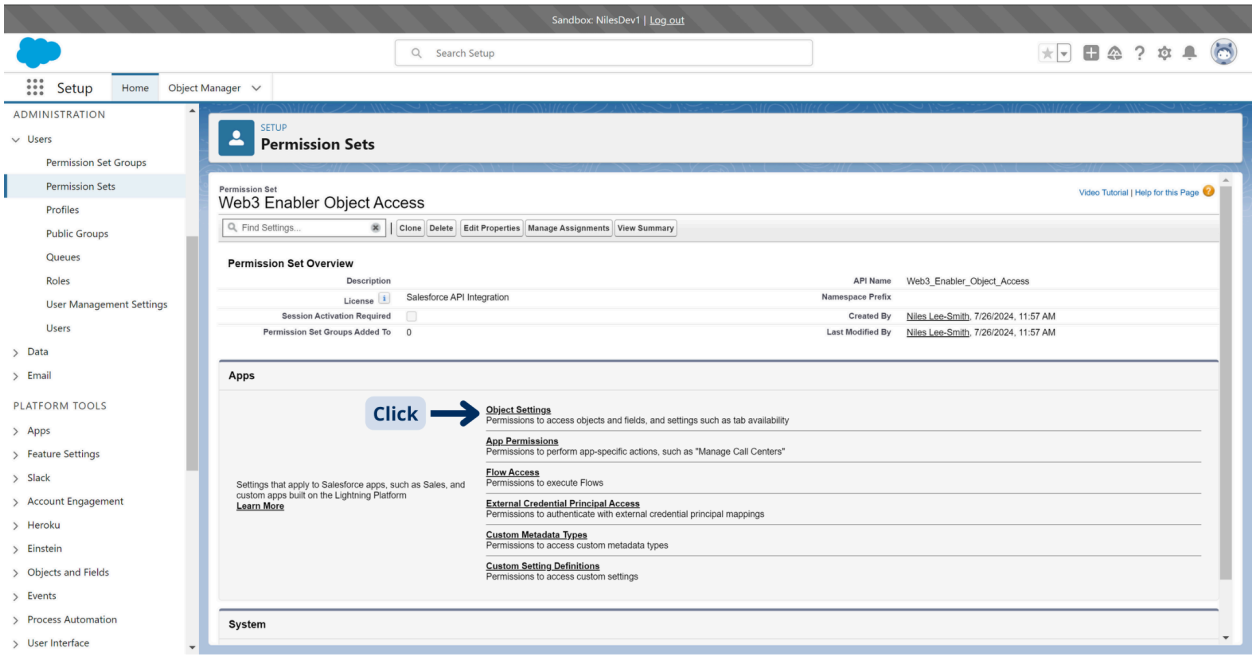
10. Click New.



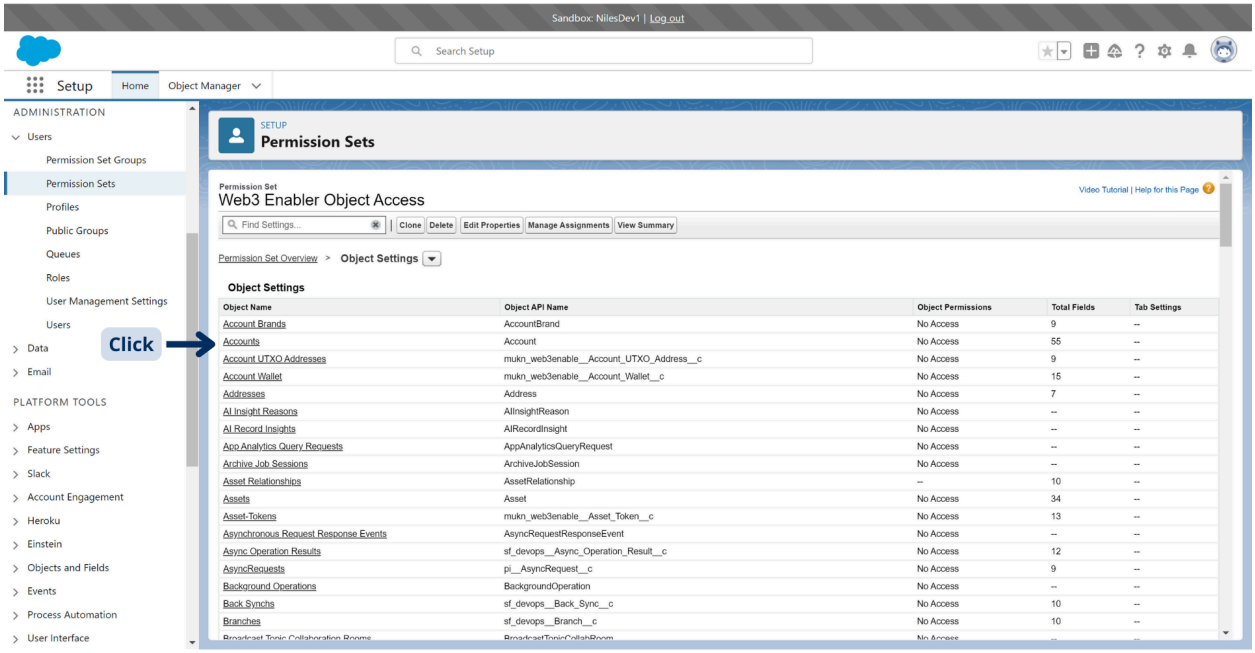
11. Create and save Web3 Enabler Object Access Permission Set.



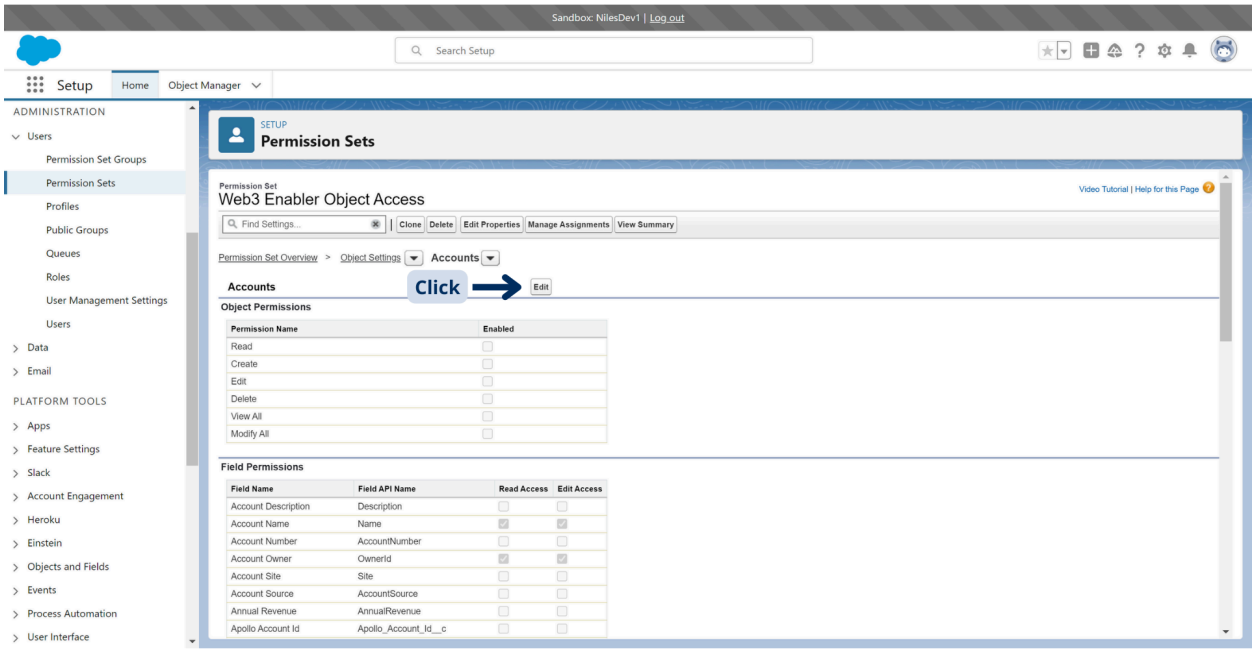
12. View Web3 Enabler Object Access Permission Set and click Object Settings.



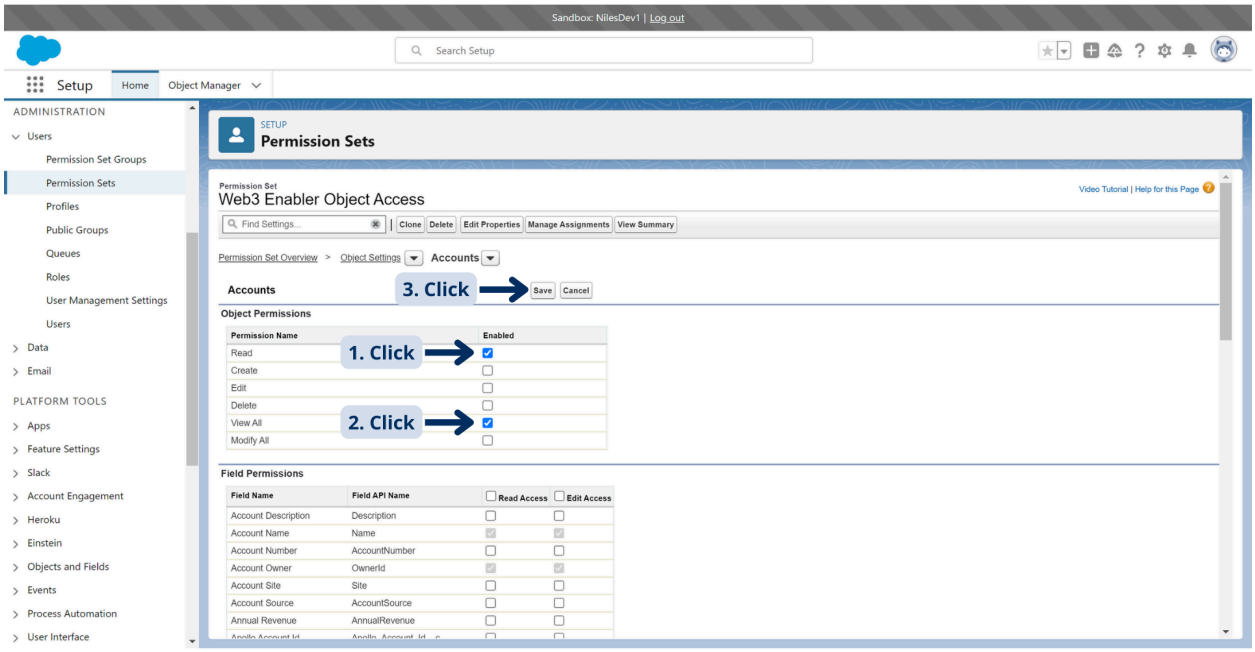
13. Click Accounts.



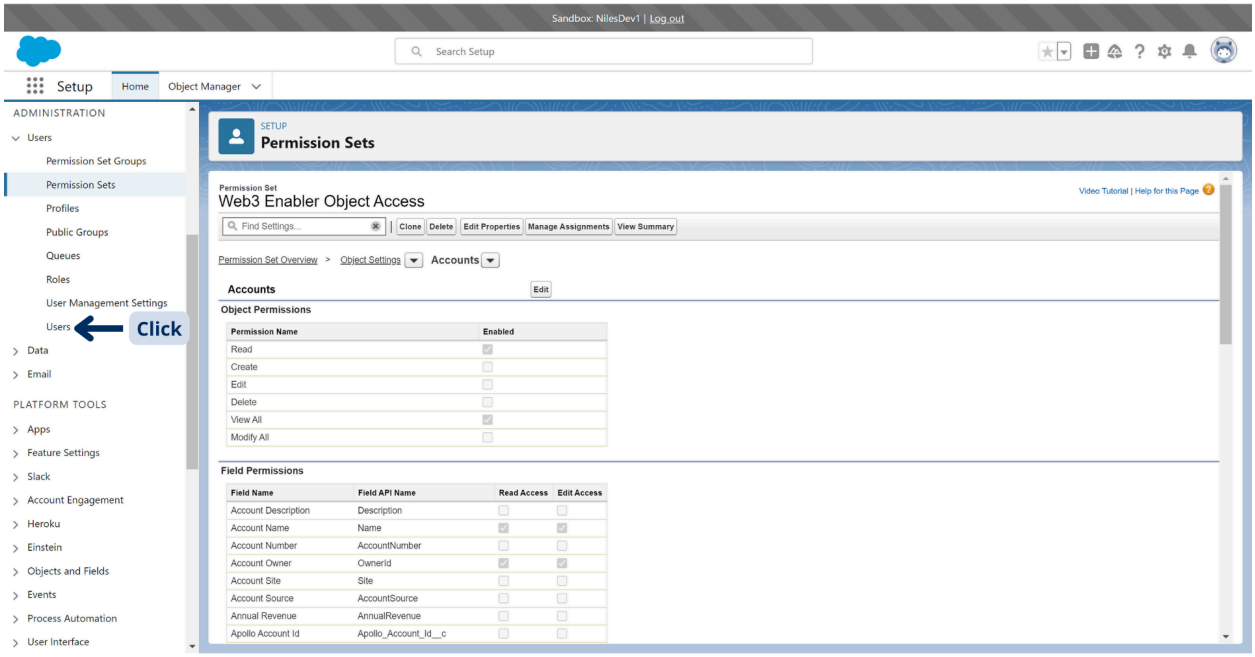
14. Click Edit.



15. Select Read and View All and click Save.

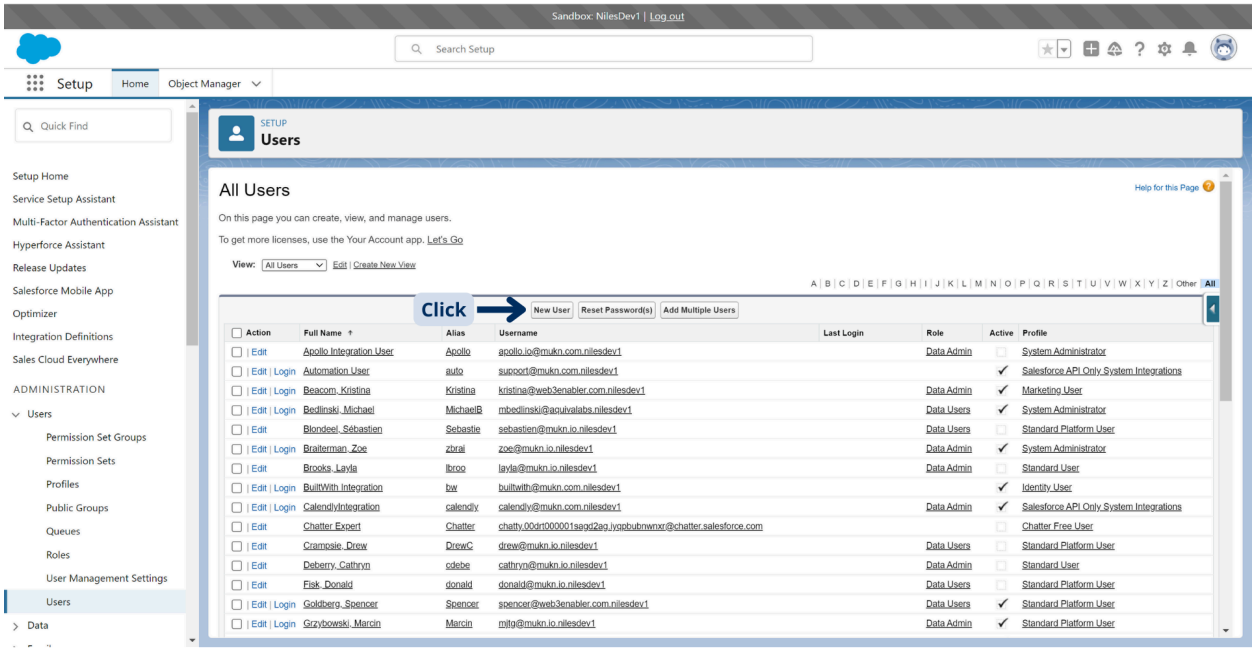


16. View Web3 Enabler Object Access and Object Permissions and click Users.

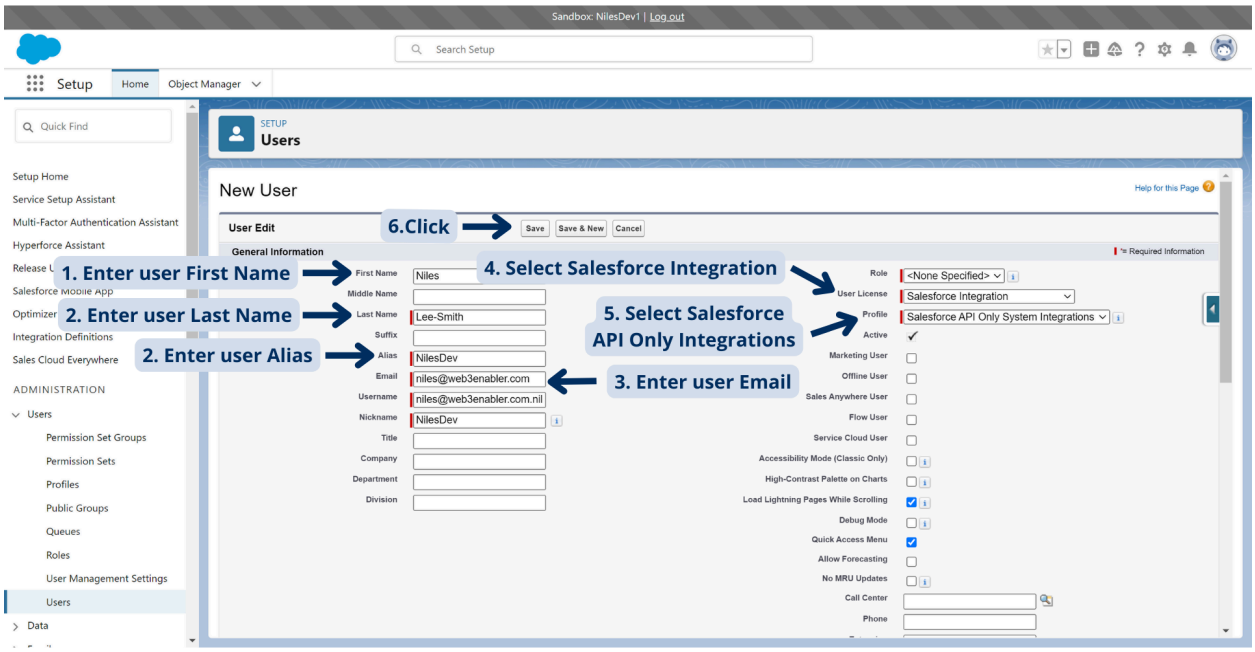


Create an Integration UserCreate an Integration User to connect Blockchain Payments with your Salesforce Org.

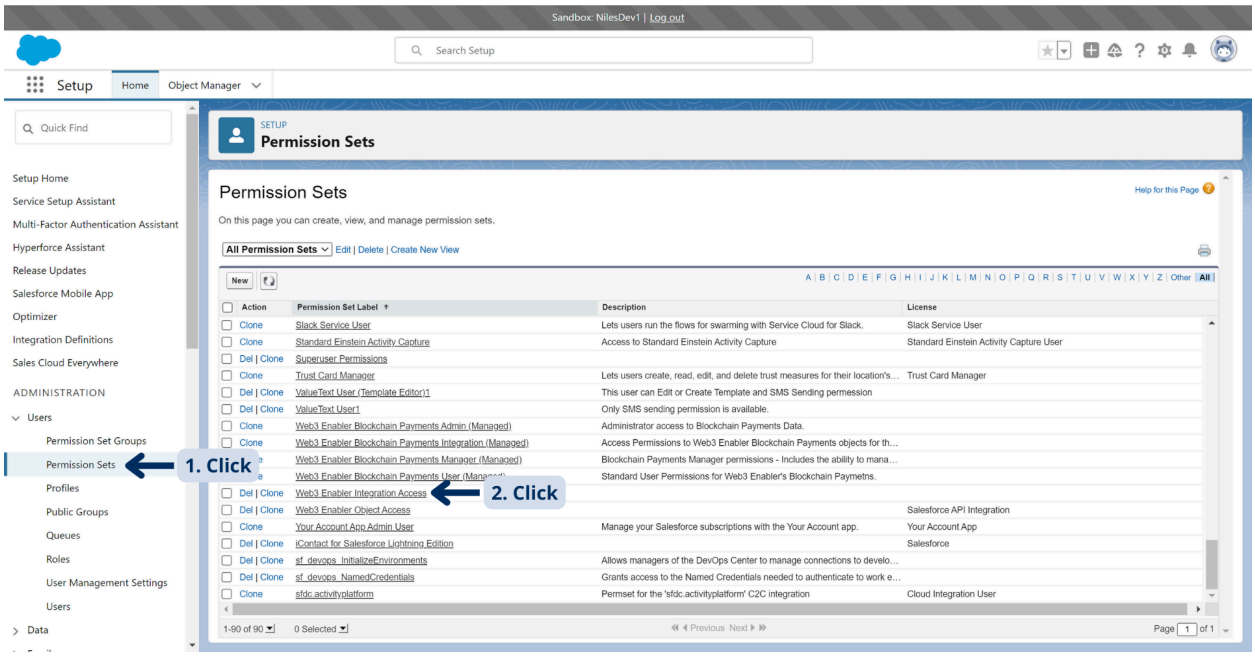
1. Click New User.



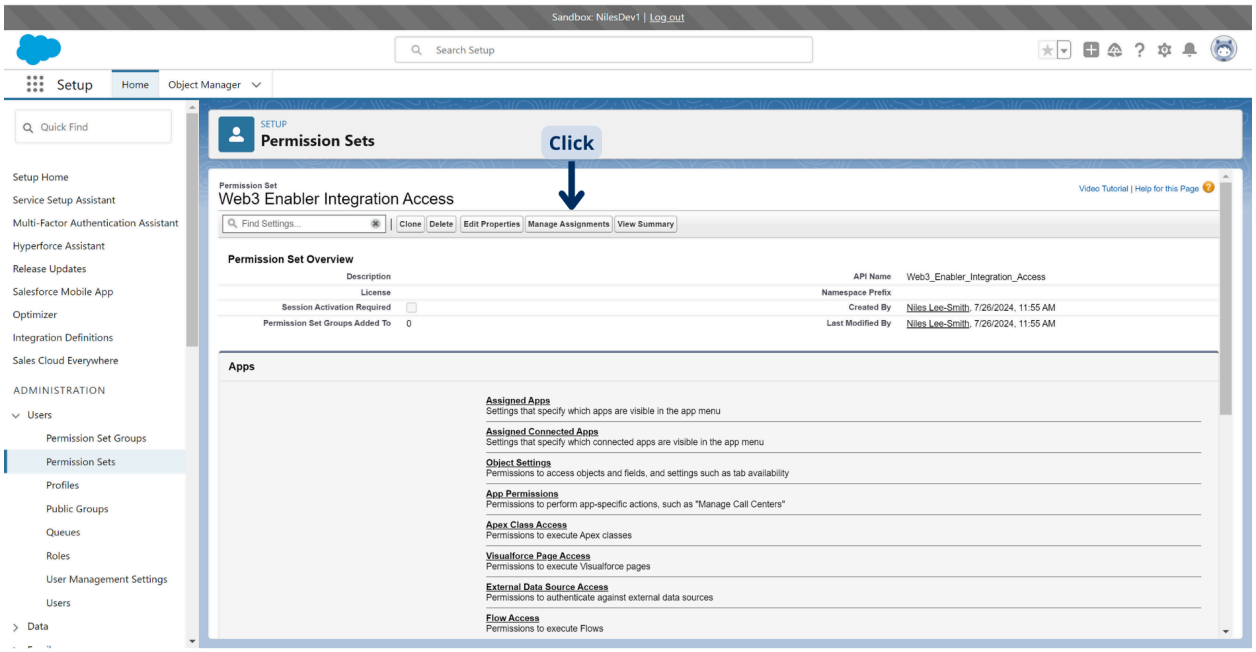
2. Create a new user and save.



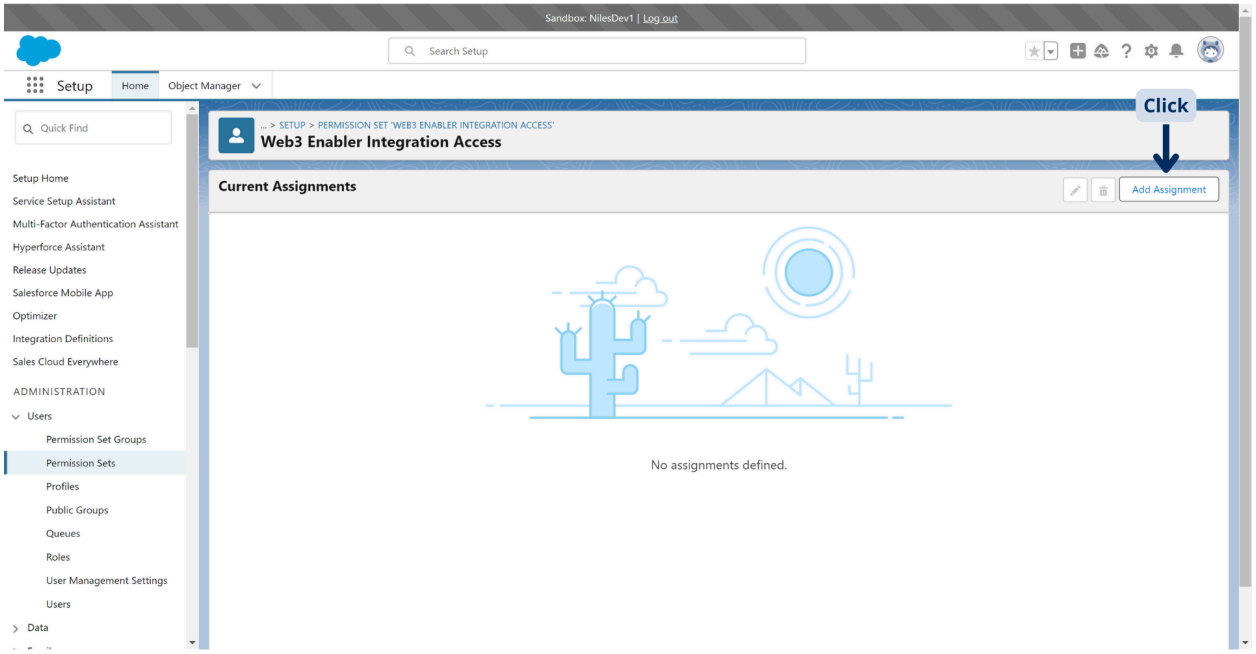
3. Click Permission Sets and click Web3 Enabler Integration Access.



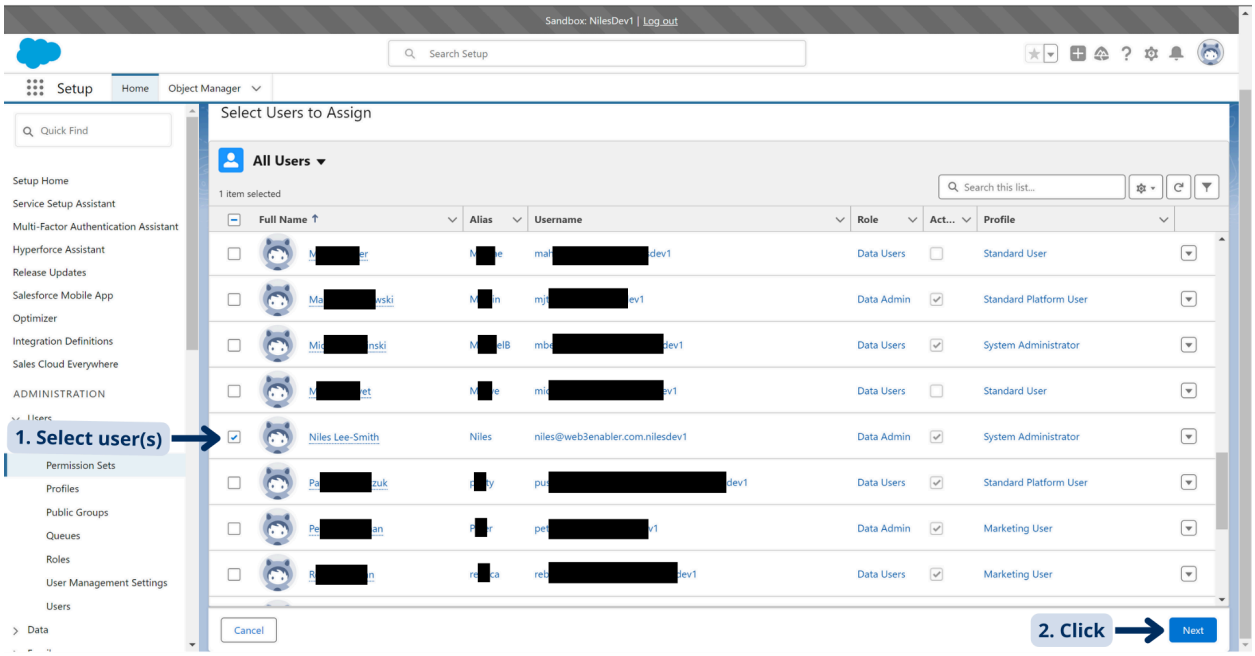
4. Click Manage Assignments.



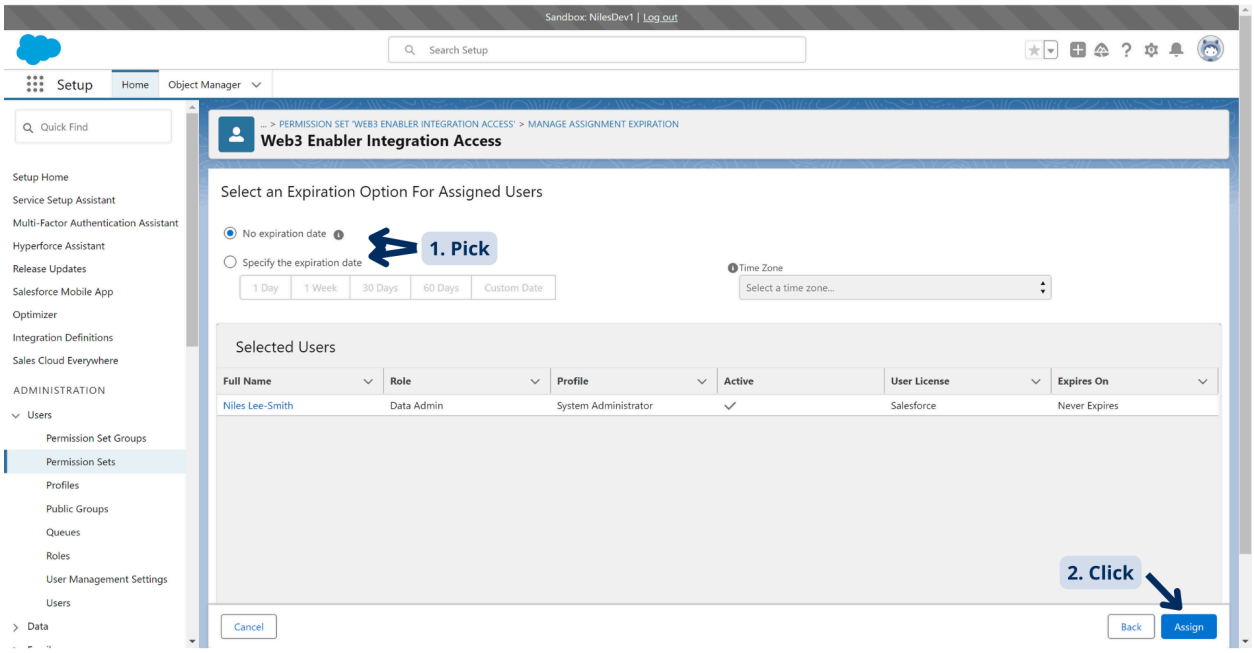
5. Click Add Assignment.



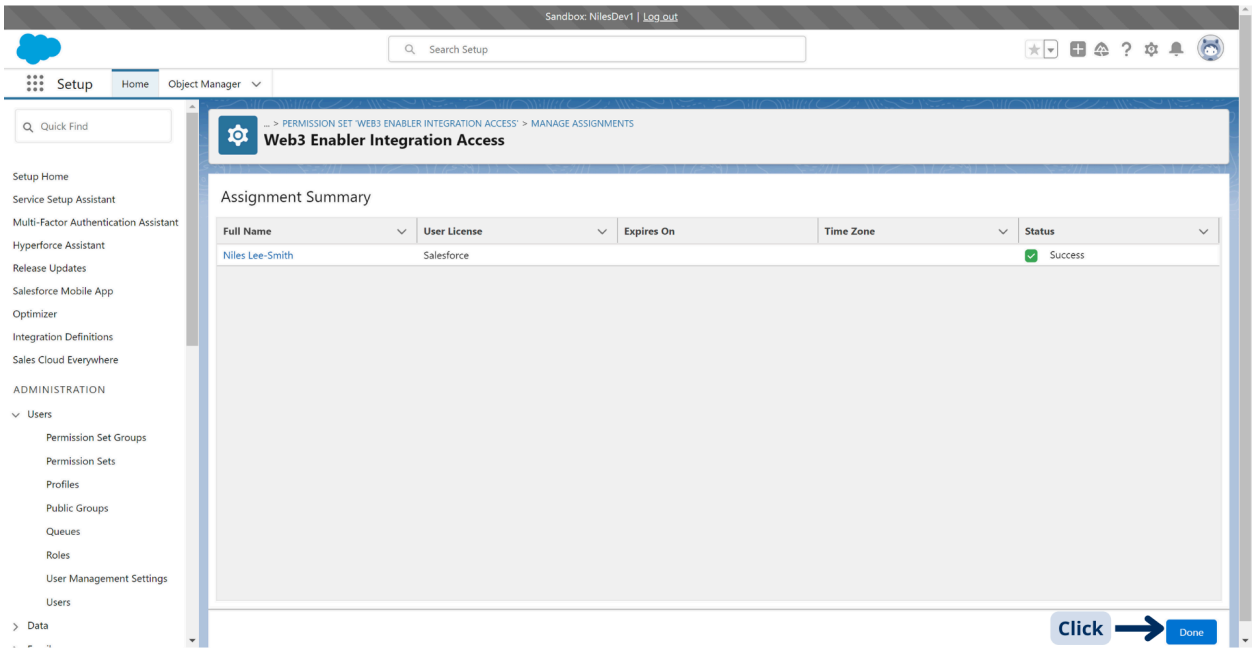
6. Select user(s) and Click Next.



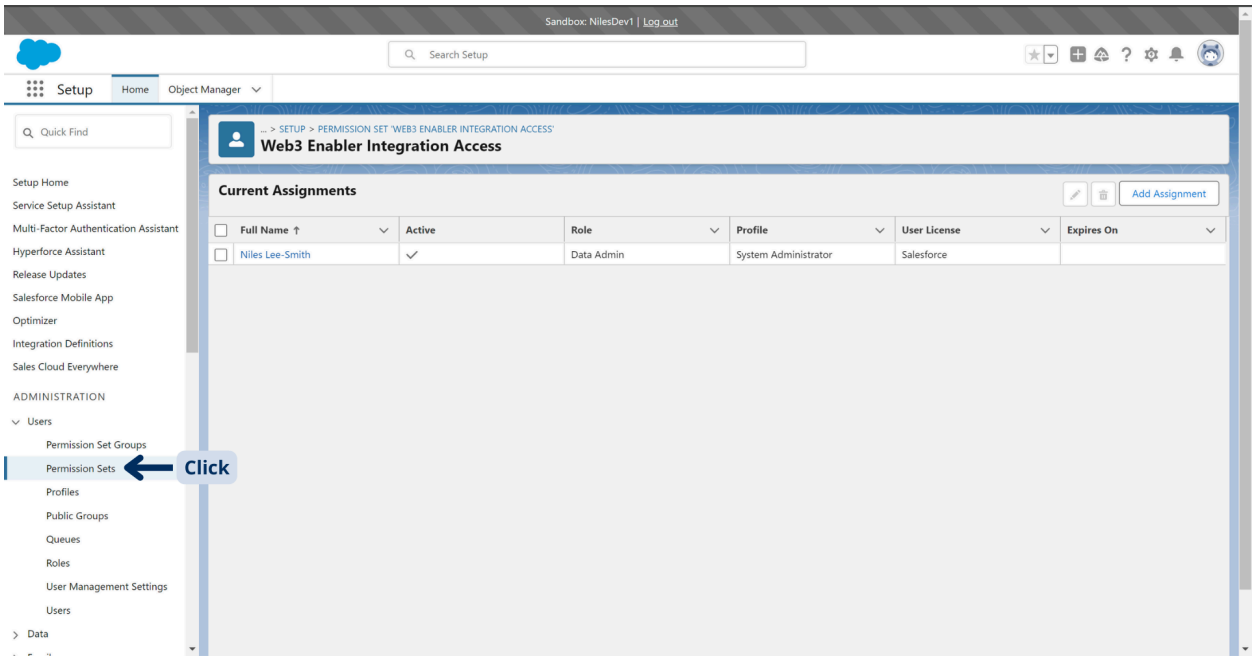
7. Select Expiration Date and click Assign.



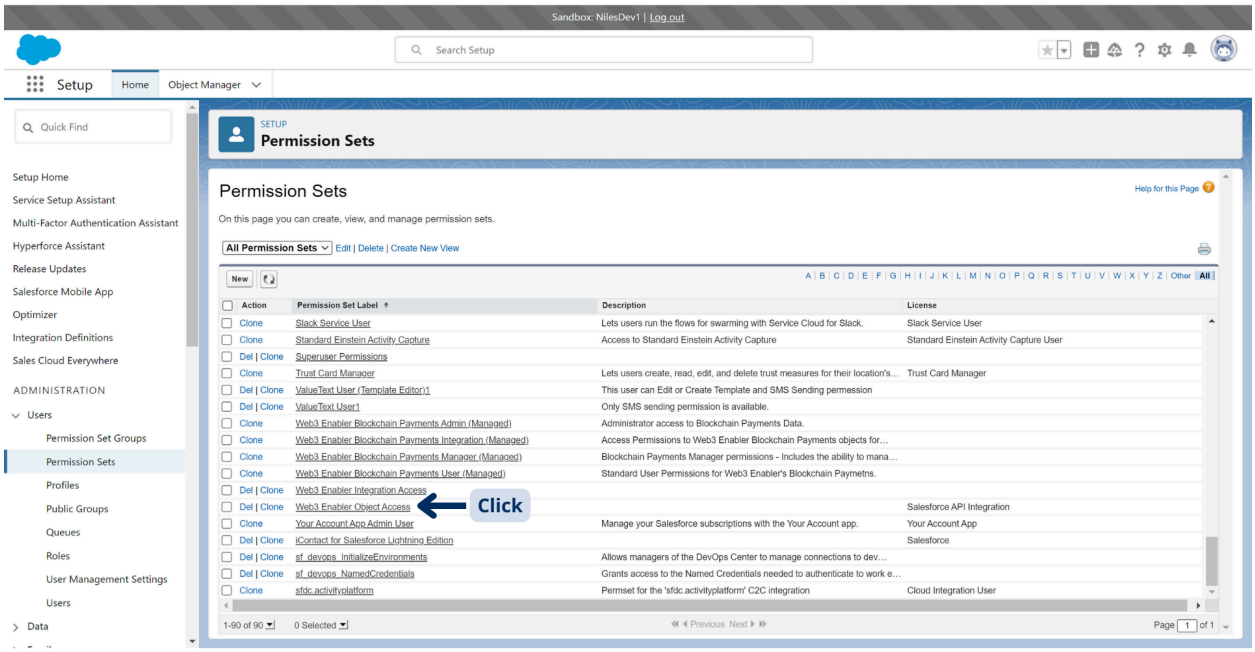
8. View Assignment Summary and click Done.



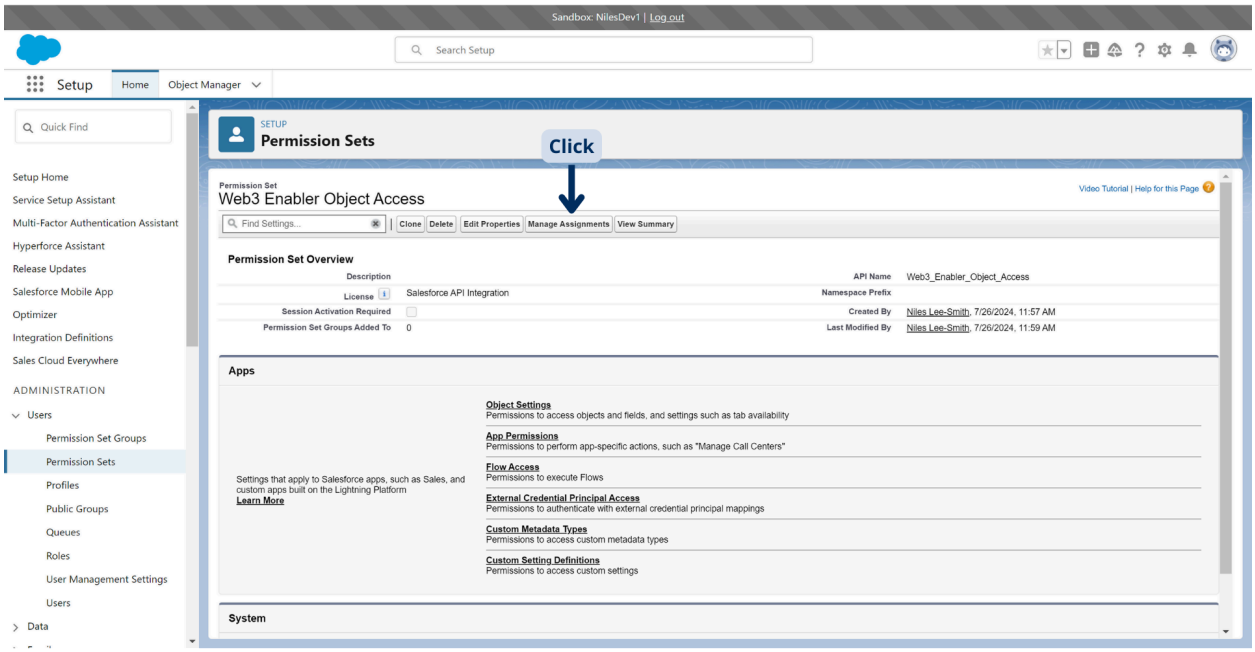
9. View Web3 Enabler Integration Access and click Permission Sets.



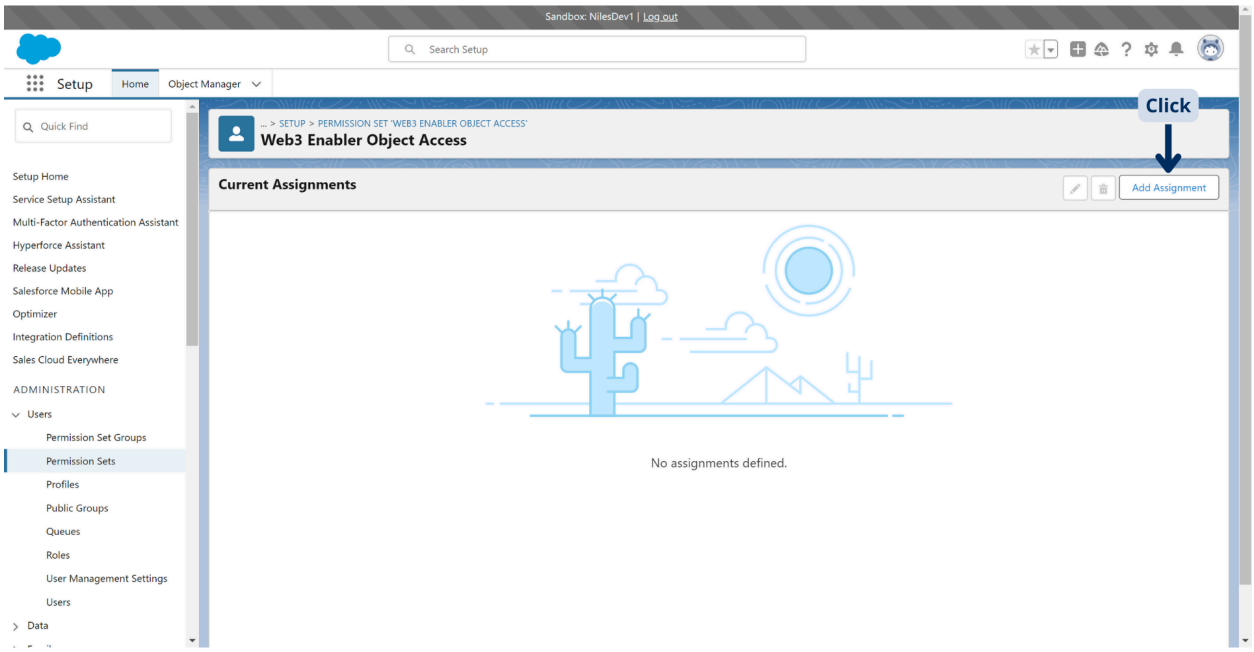
10. Click Web3 Enabler Object Access.



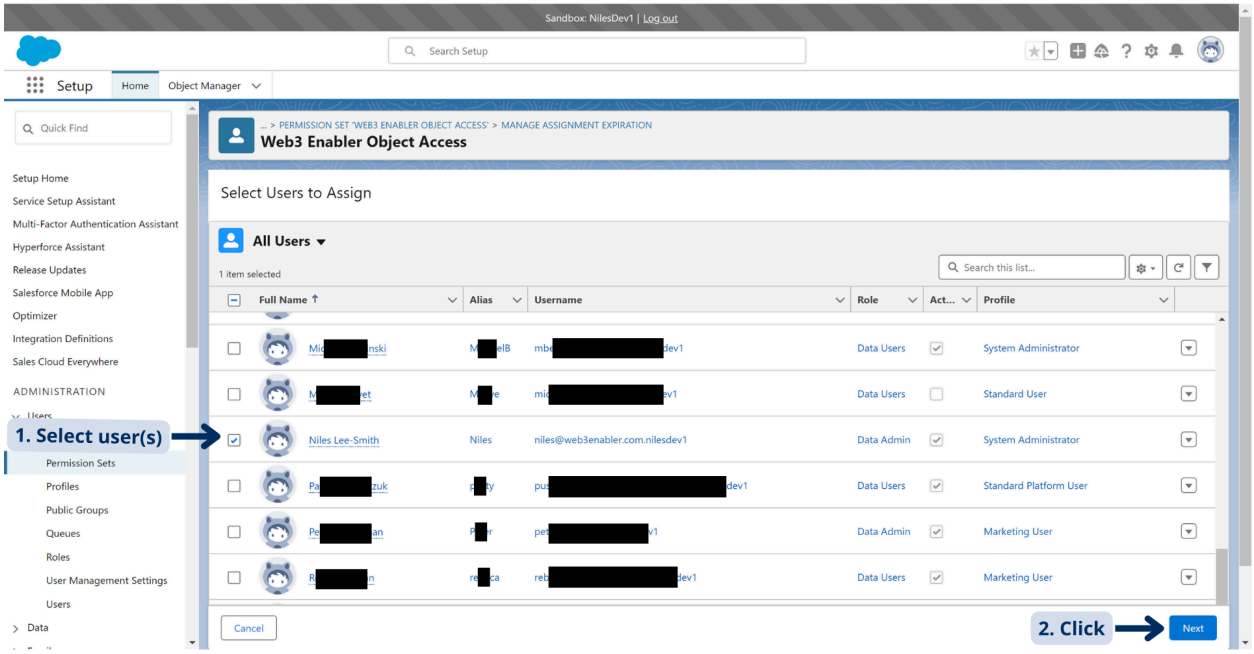
11. Click Manage Assignments.



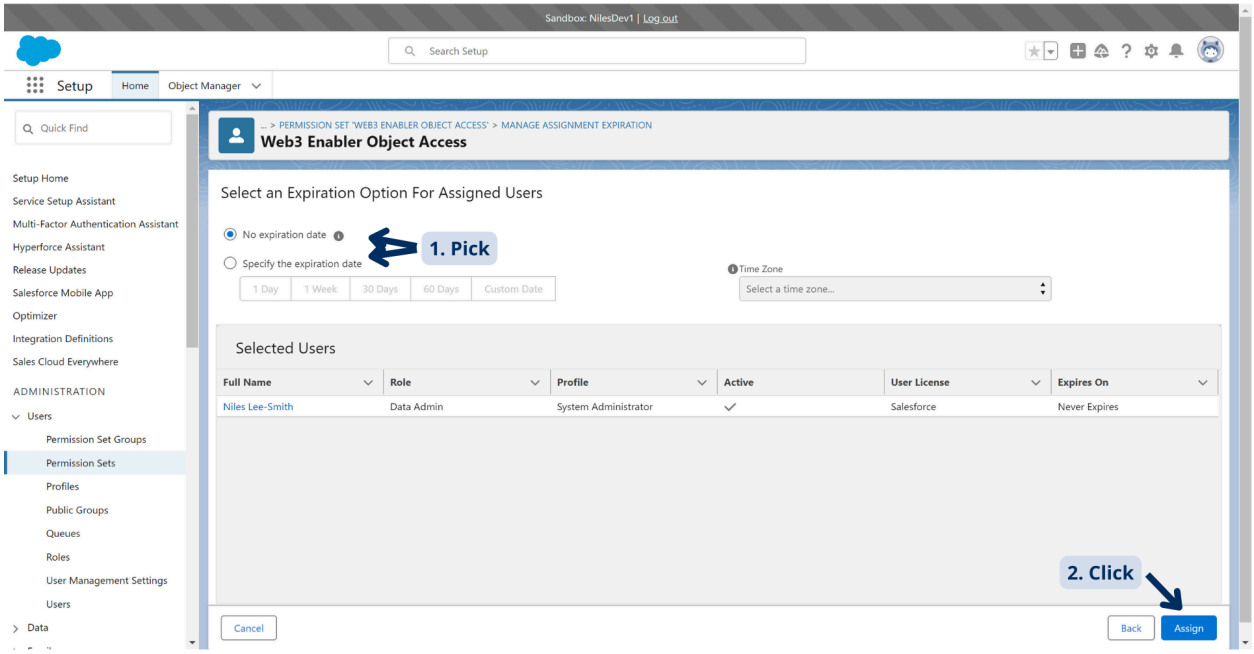
12. Click Add Assignment.



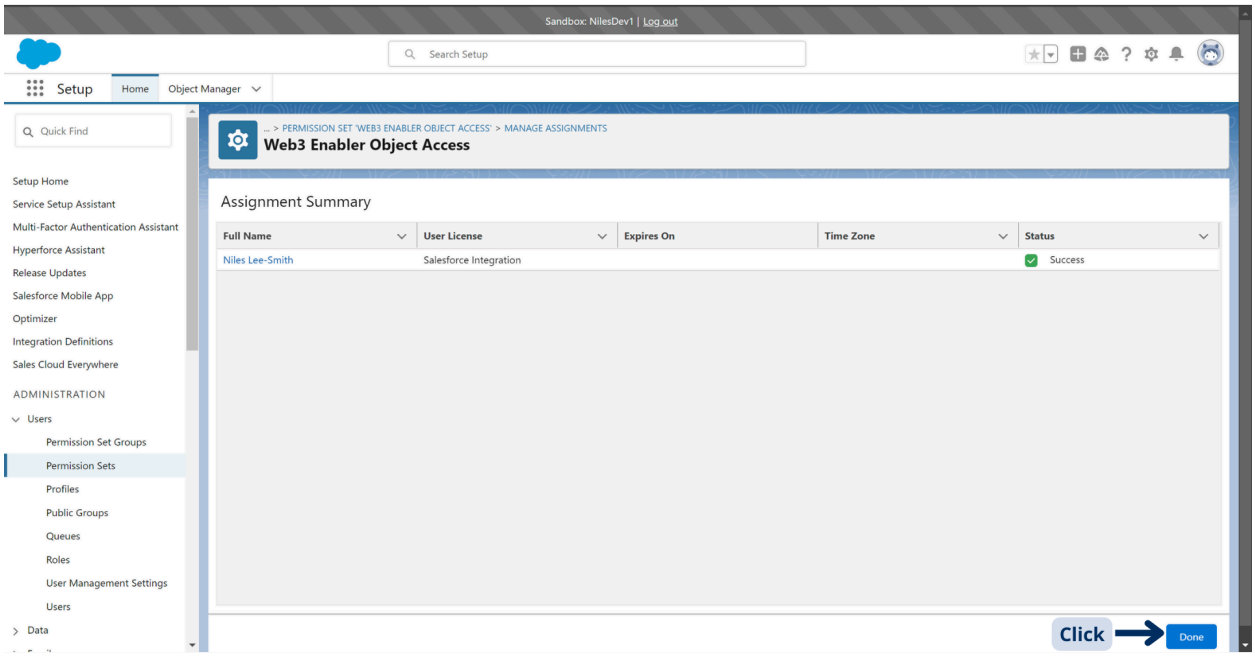
13. Select user(s) and click Next.



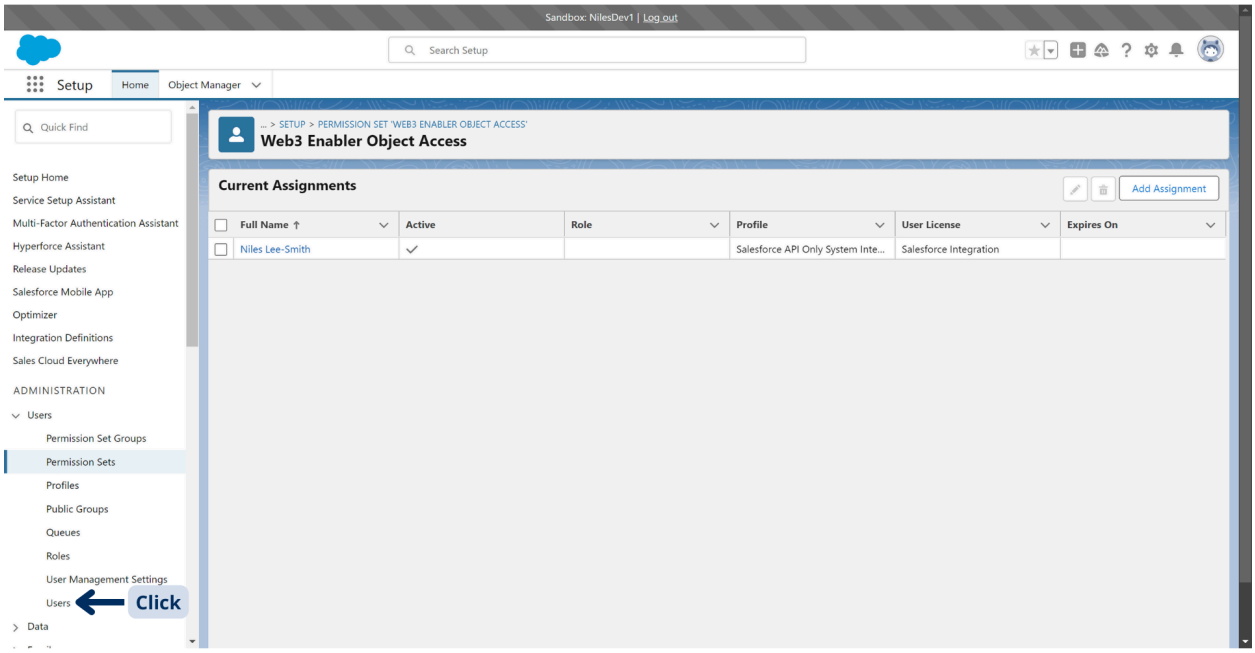
14. Select Expiration Date and click Assign.



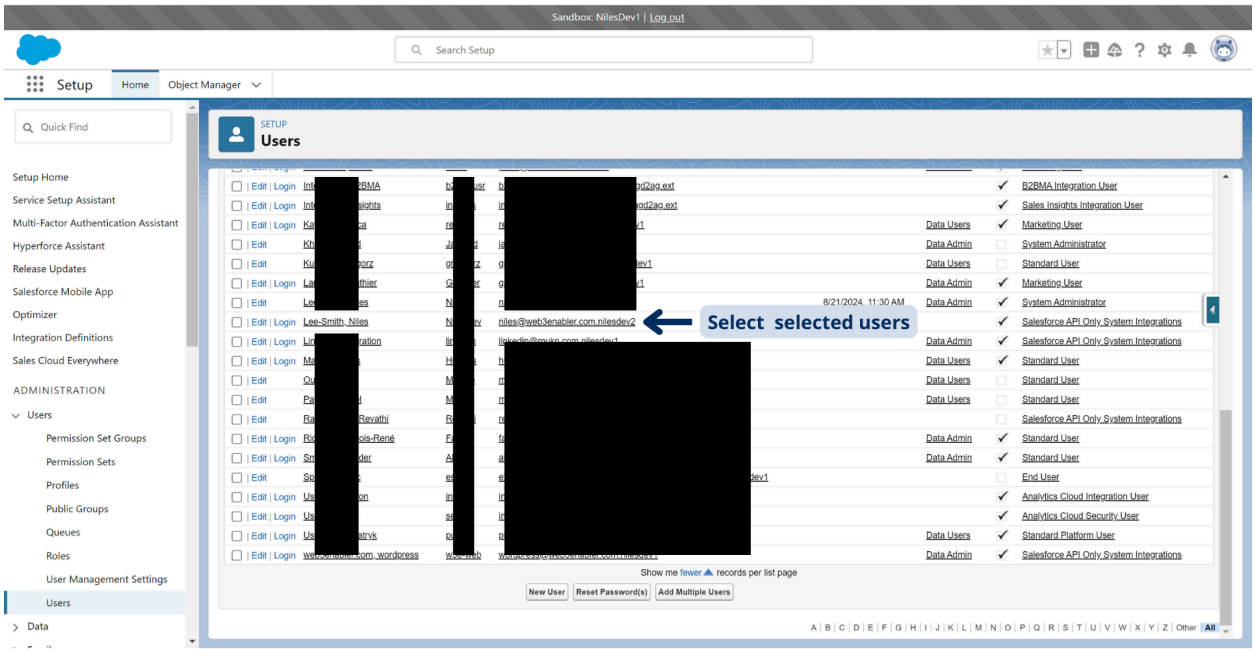
15. View Assignment Summary and click Done.



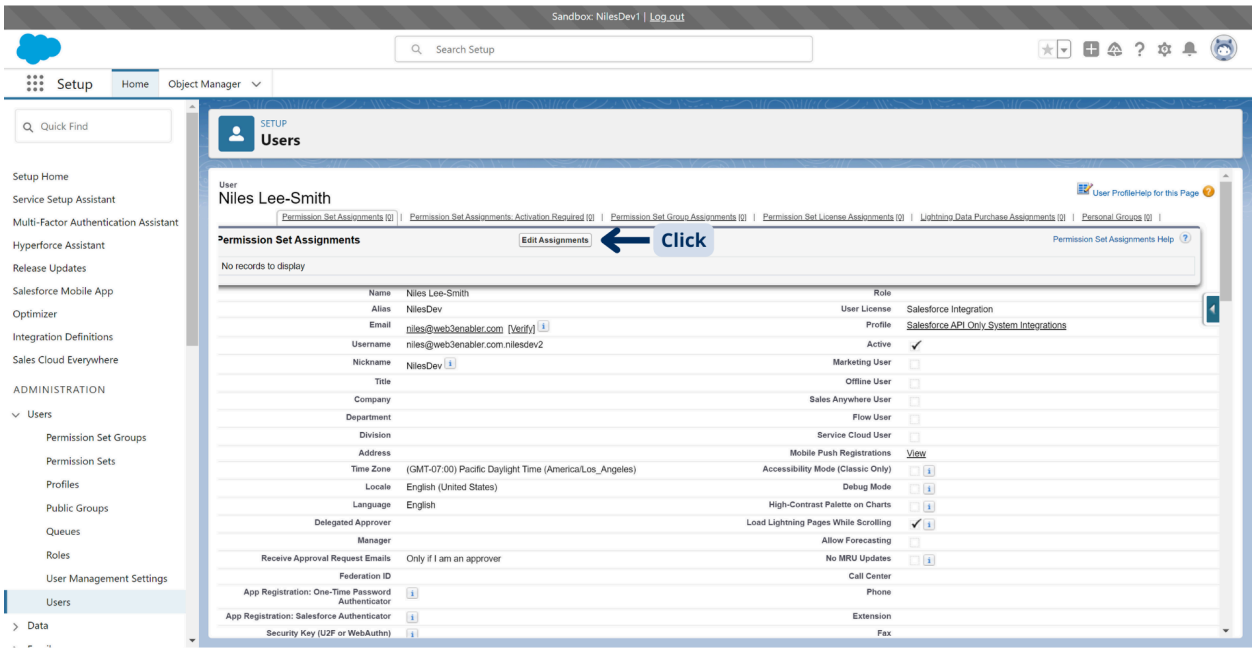
16. View Web3 Enabler Object Access and click Users.



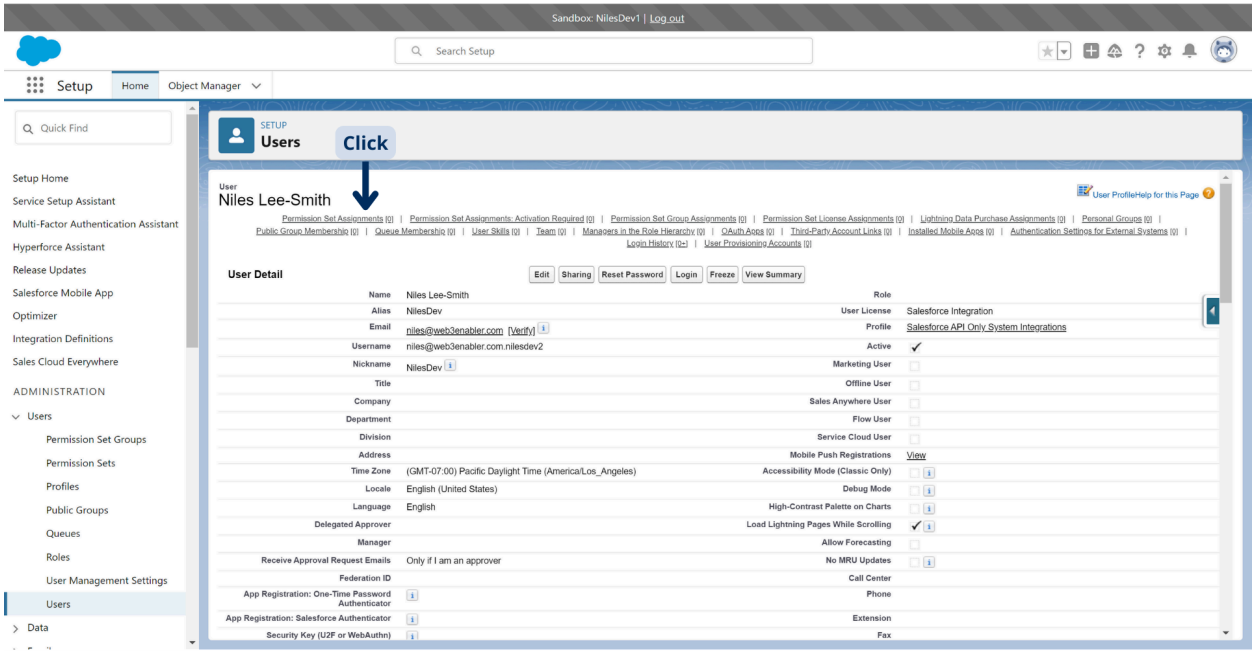
17. Click user name.



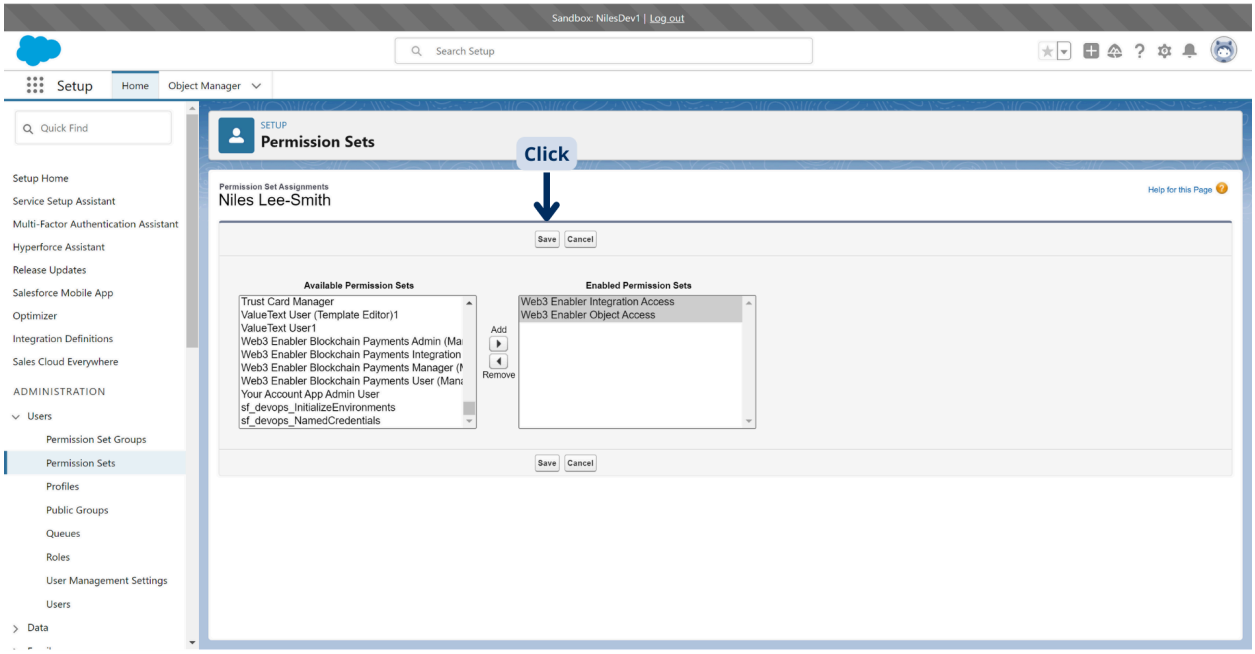
18. Click Edit Assignments.



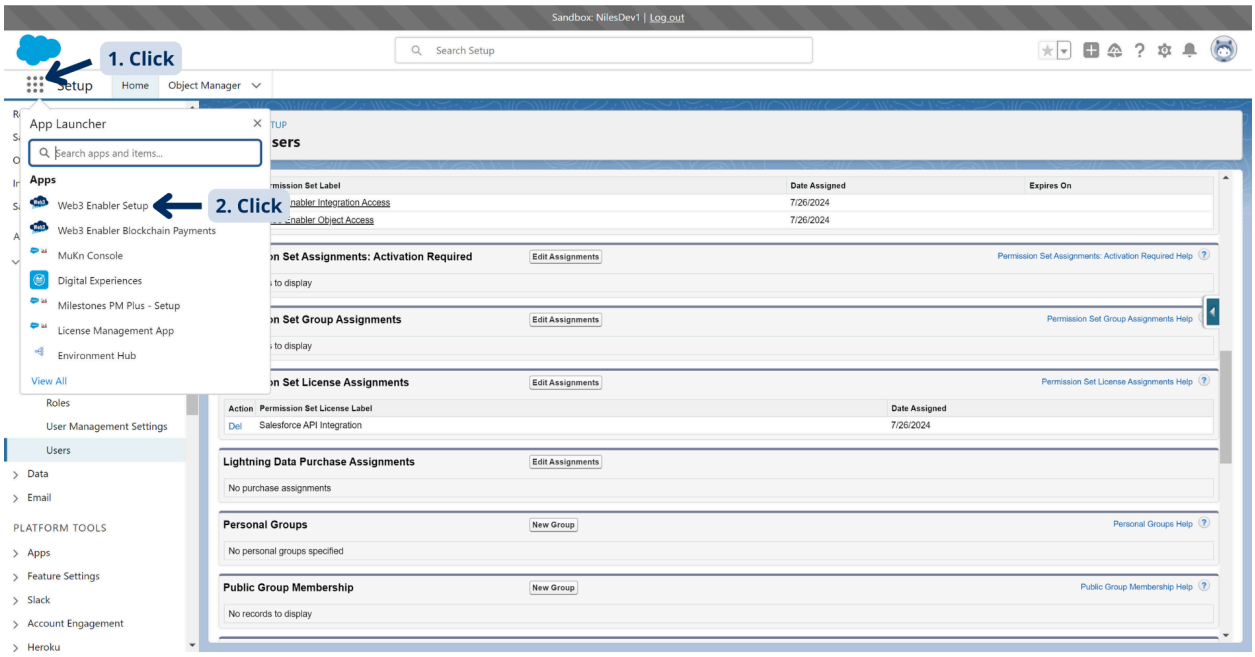
19. Click Permission Set Assignments.



20. Click save.



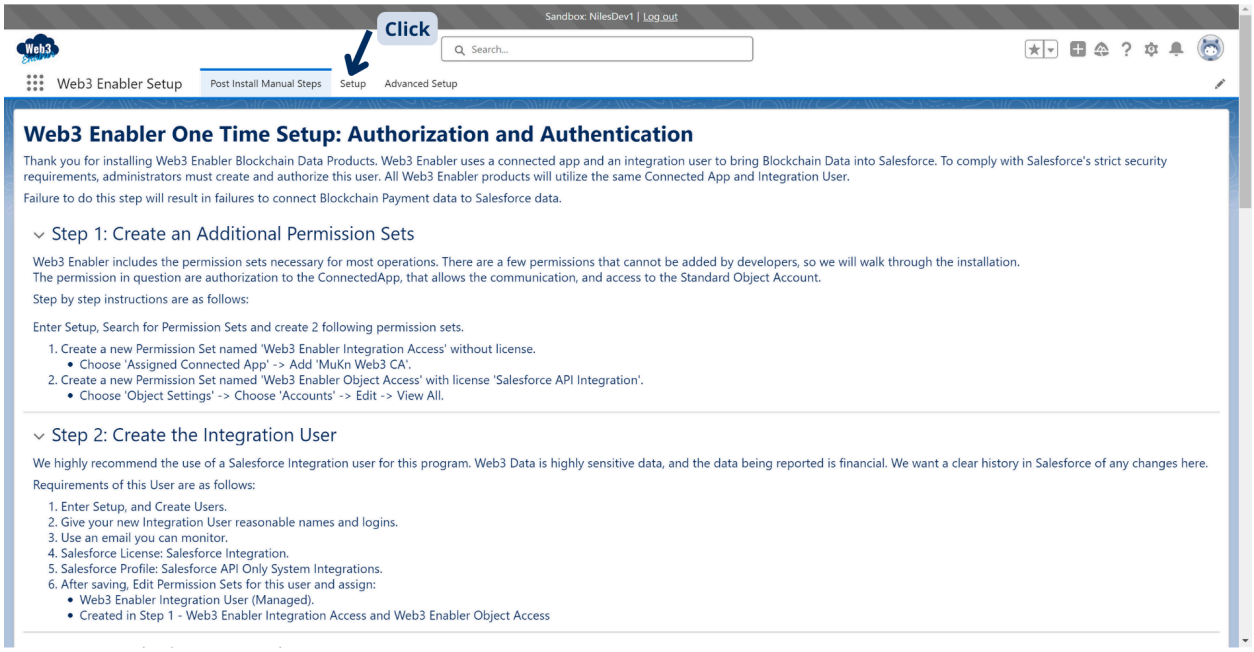
21. View Users Permission Set Assignments and go to Web3 Enabler Setup.



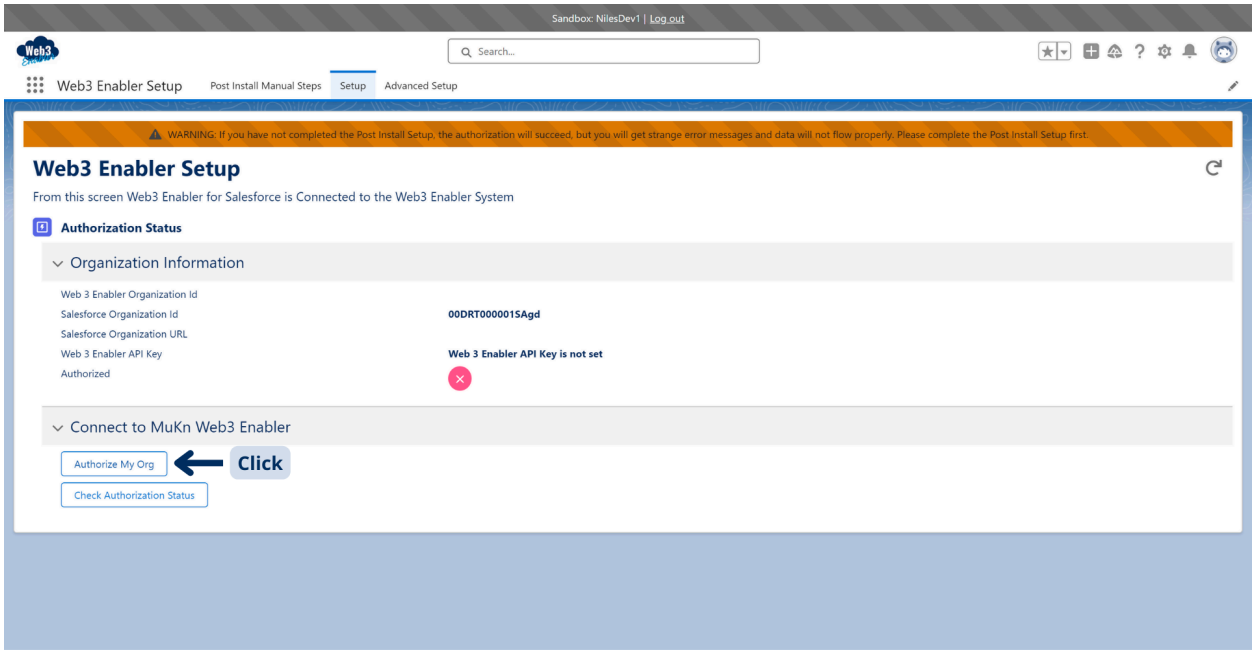
Authorize MuKn Web3 CA

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

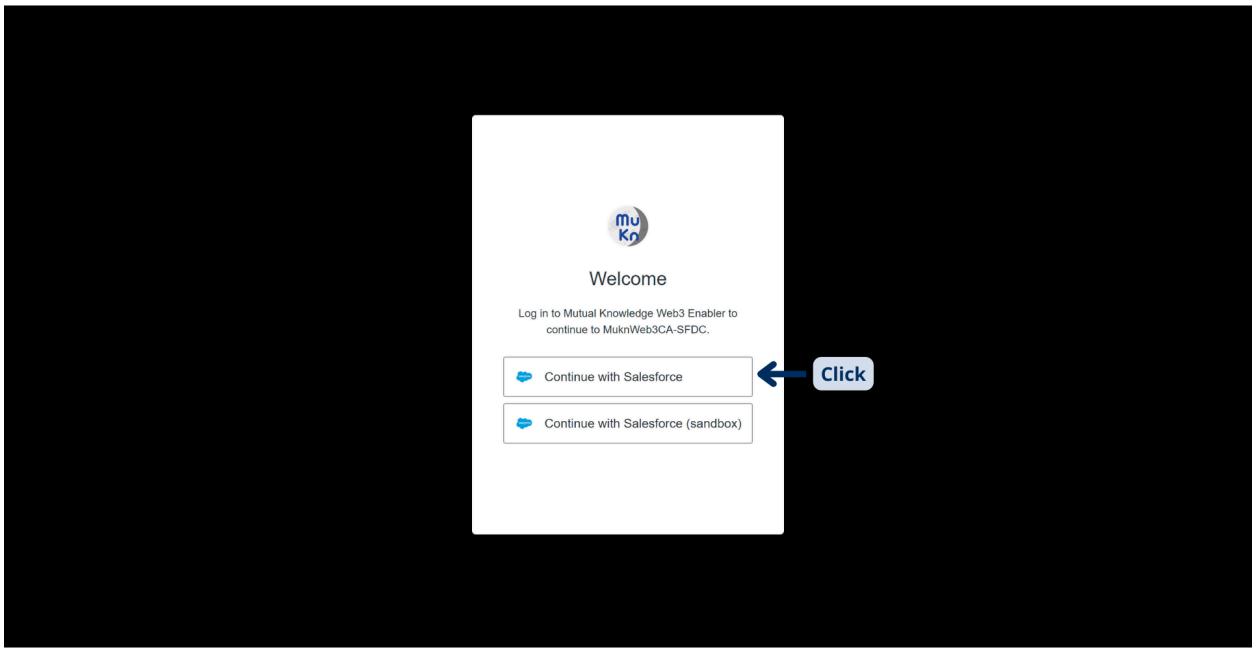
1. Click Setup.



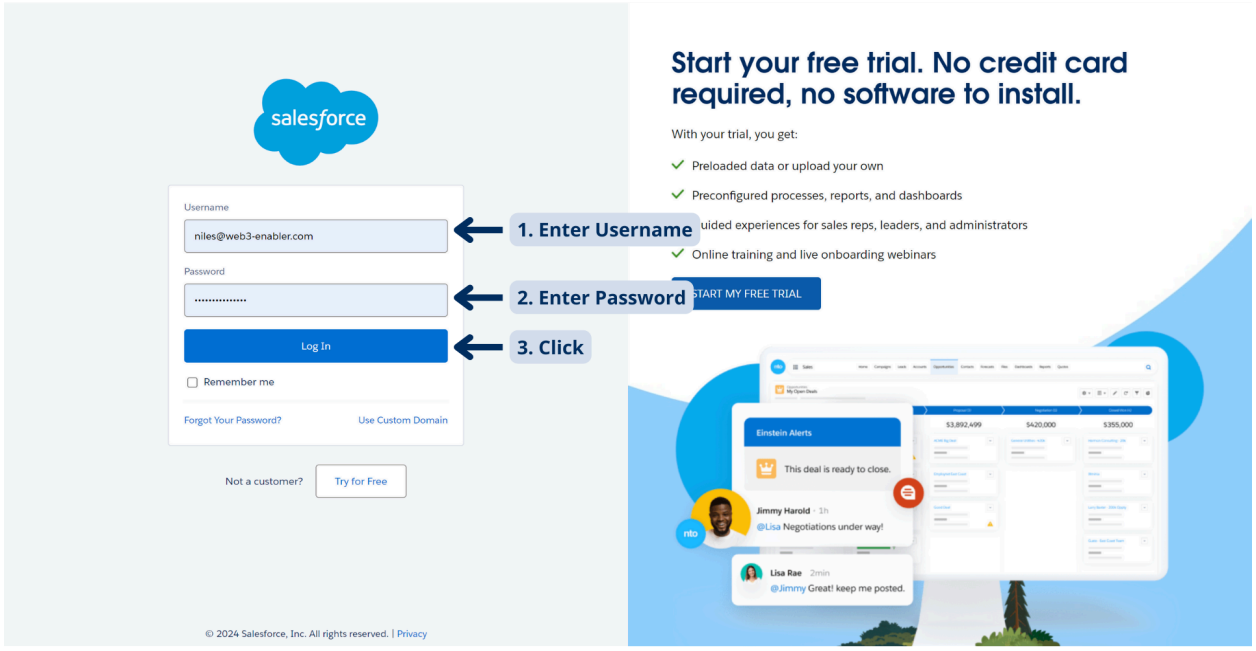
2. Click Authorize My Org.



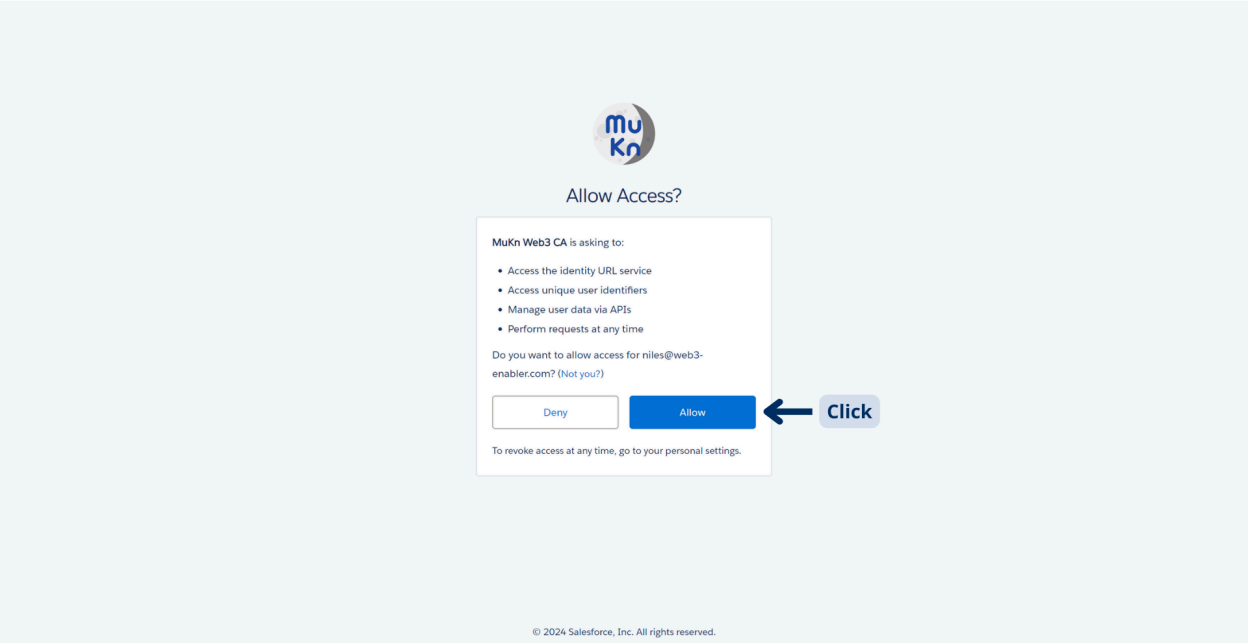
3. Click Continue with Salesforce.



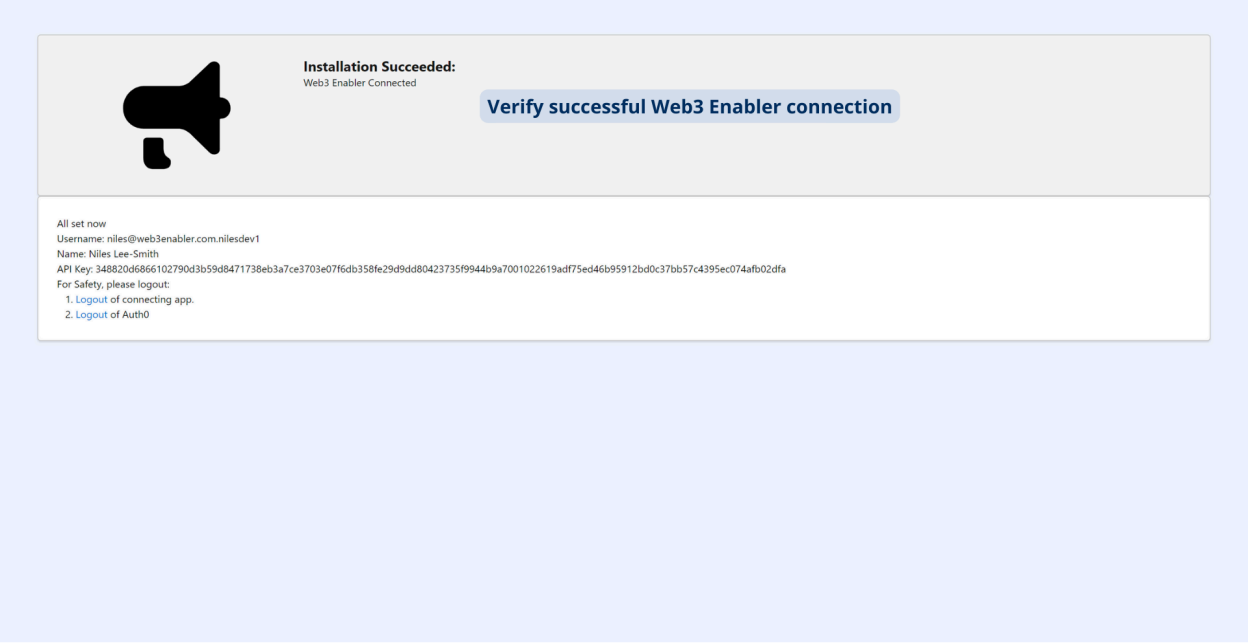
4. Log into Salesforce.



5. Click Allow.



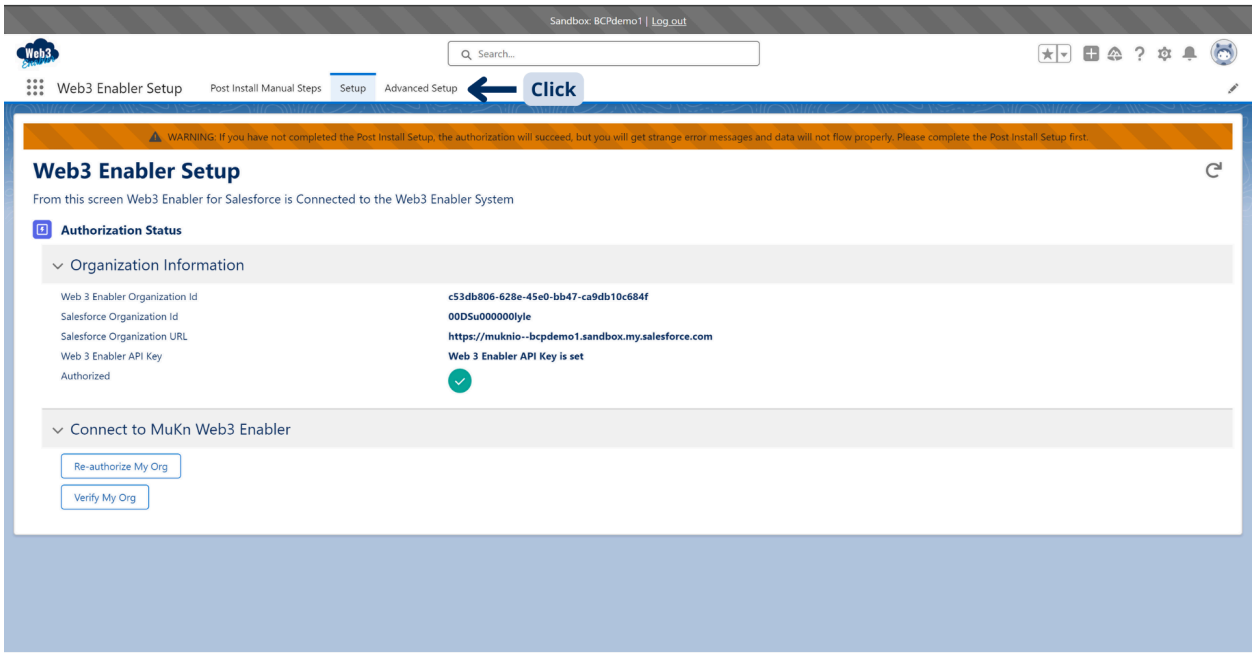
6. View successful installation.



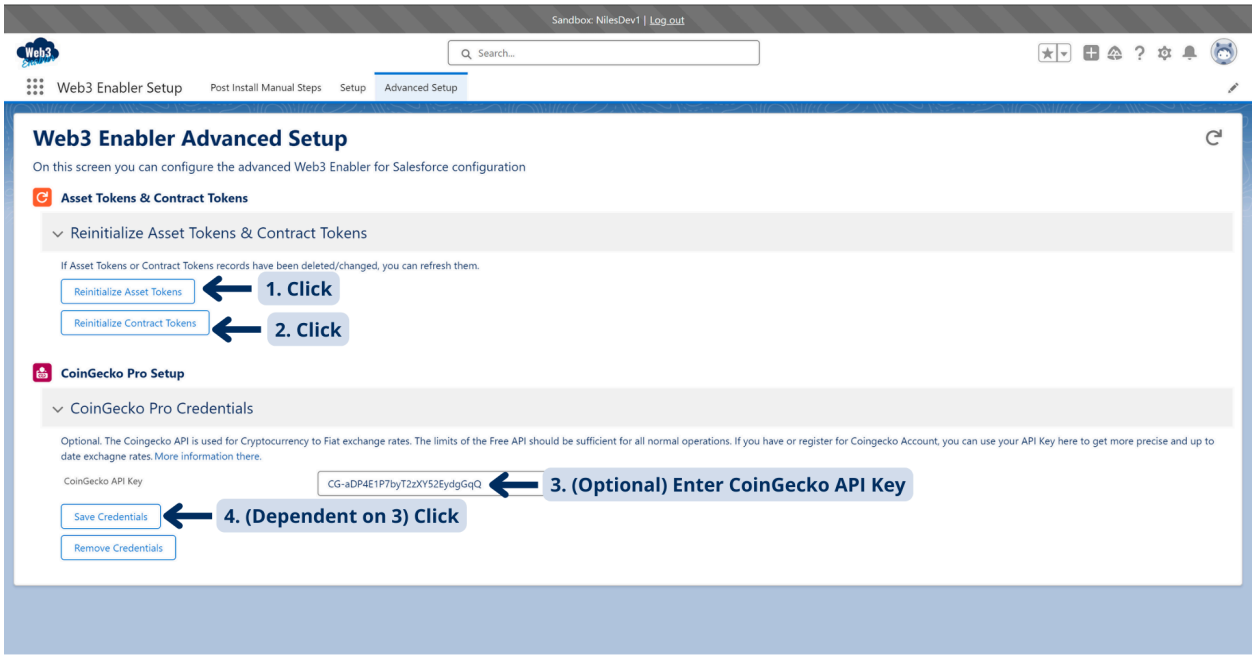
Web3 Enabler Advanced Setup

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

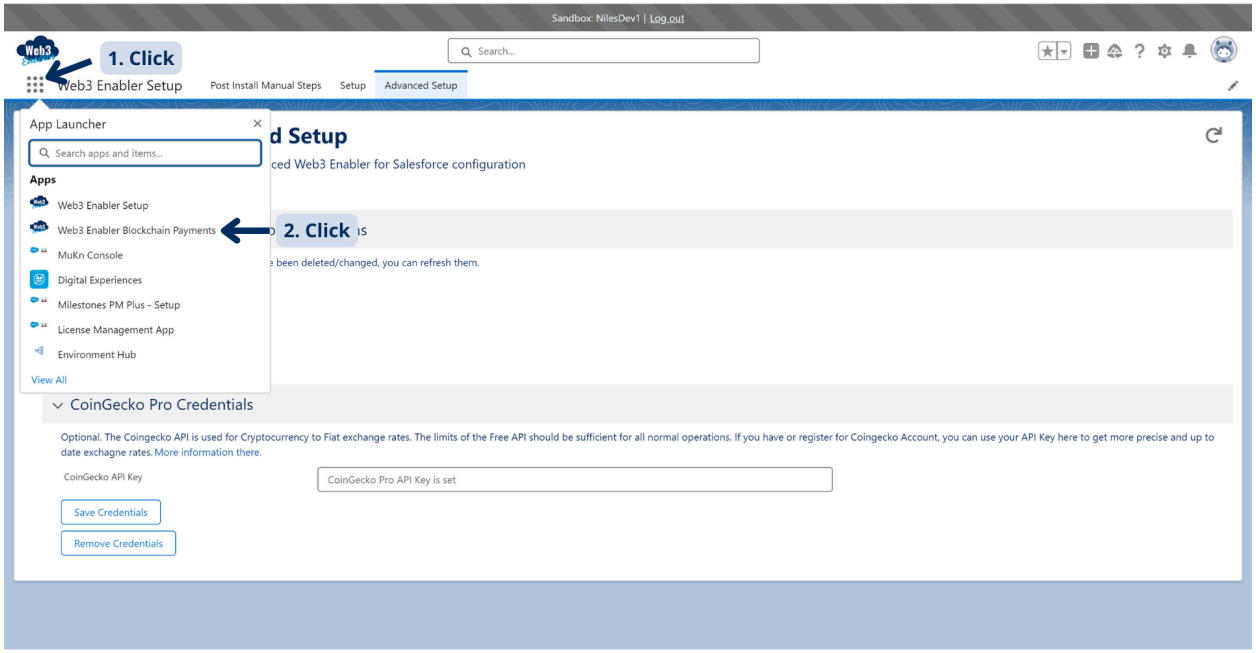
1. Click Advanced Setup.

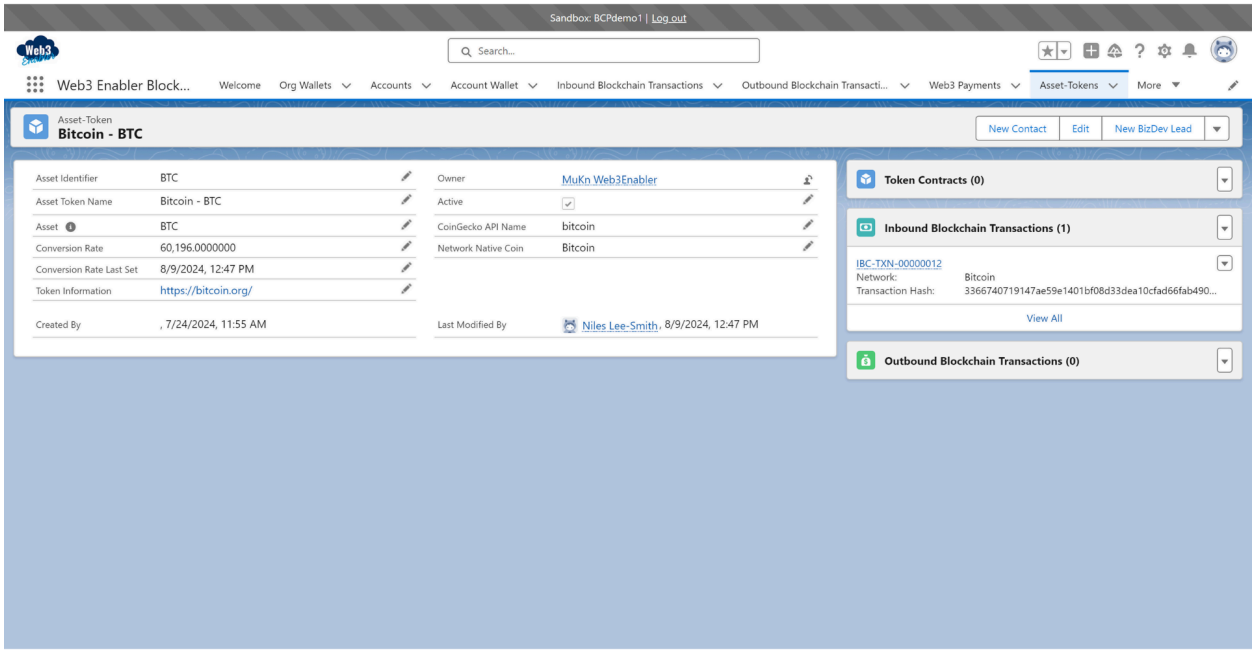


2. Click Reinitialize Asset Tokens and Reinitialize Contract Tokens and enter Coingecko API key.



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.