Blockchain Payments for Salesforce

Web3 Enabler

Admin Configuration Guide V2.5

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 and Tron Networks.

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/XRP/Tron 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.

Configuration Instructions (Quick Start)

Before configuration, 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.

Step by Step Instructions:

1. Open Web3 Enabler Setup.
2. Create additional permission sets.
    a. Web3 Enabler Connected App Access
    b. Salesforce API Integration
3. Create/Choose a Salesforce Integration User.
4. Authorize MuKn Web3 CA.
5. Activate paths in your Salesforce organization.
6. Complete Advanced Setup (Optional).

Usage Settings (Quick Start)

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.

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.

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.

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 is authorization to the ConnectedApp, which allows the communication, and access to the Standard Object Account.

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.

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 Rollout (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.

Additionally, Networks like XRP or Tron may be extremely popular, depending on your market.

Configuration Instructions (Full)

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

Step By Step Instructions:

0. Install the Package from the AppExchange available to All User or Selected Group of Users.
1. Open App Launcher, and select Web3 Enabler Setup.
2. Create additional 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.
    a. Permission Set 1:
        i. Name: Web3 Enabler Integration Access
        ii. License Required: None
        iii. Permissions: “Assigned Connected Apps’’ -> MuKn Web3 CA
    b. Permission Set 2:
        i. Name: Web3 Enabler Object Access
        ii. License Required: Salesforce API Integration
        iii. Permissions: “Object Settings” -> Choose “Accounts” -> View All Records
3. Create/Choose a Salesforce 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.
    a. Recommended case - A dedicated Web3 Integration user
        i. Enter Setup, and Create Users
        ii. Give your new Integration User reasonable names and logins
        iii. Use an email you can monitor
        iv. Salesforce License: Salesforce Integration
        v. Salesforce Profile: Salesforce API Only System Integrations
        vi. Edit Permission Sets and assign this user:

1. Web3 Enabler Blockchain Payments Integration User (Managed)
2. Web3 Enabler Integration Access
3. Web3 Enabler Object Access

b. Alternative case
   i. Use a normal Salesforce user
   ii. Edit Permission Sets for this user and assign:
      1. Web3 Enabler Blockchain Payments Integration User (Managed)
      2. Connected App (via Profile or Permission Set)

4. Authorize MuKn Web3 CA.
   a. Make sure you have the User/Password from the User Created in Step Three.
   b. Go to the “Setup Tab” and click Authorize My Org (we recommend that you right-click and use an Incognito / Private Browser).
   c. Login and Authorize.
   d. After Authorization, refresh the Web3 Enabler Setup Tab, you should see everything.
5. Activate paths in your Salesforce organization - Paths help to boost productivity. They guide users through the steps of the business process, such as working on Web3 Payment.
   a. Enter Setup, and Path Settings.
   b. Enable chosen paths.
6. Configure Advanced Setup (Optional).
   a. Go to the “Advanced Setup” tab.
   b. Enter Payment Variance Accepted - Accepted payment variance refers to the allowable difference between the invoiced amount and the payment received during transaction processing. When setting up, this tolerance can be configured to a specific percentage, ensuring that minor discrepancies do not result in payment rejections or delays.
   c. Enable logging - Recommended. You can enable error logging which may help troubleshoot problems.
   d. Reinitialize Asset Tokens and Contract Tokens - If Asset Tokens or Contract Tokens records have been deleted/changed, you can refresh them.
   e. Enter CoinGecko API Key - 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 a Coingecko Account, you can use your API Key here to get more precise and up to date exchange rates.
   f. Enter BitRank API Key - BitRank is a blockchain intelligence software that provides fast, easy, and accurate real-time monitoring and scoring of transactions and wallets to stop transactions with bad actors and sanctioned entities.

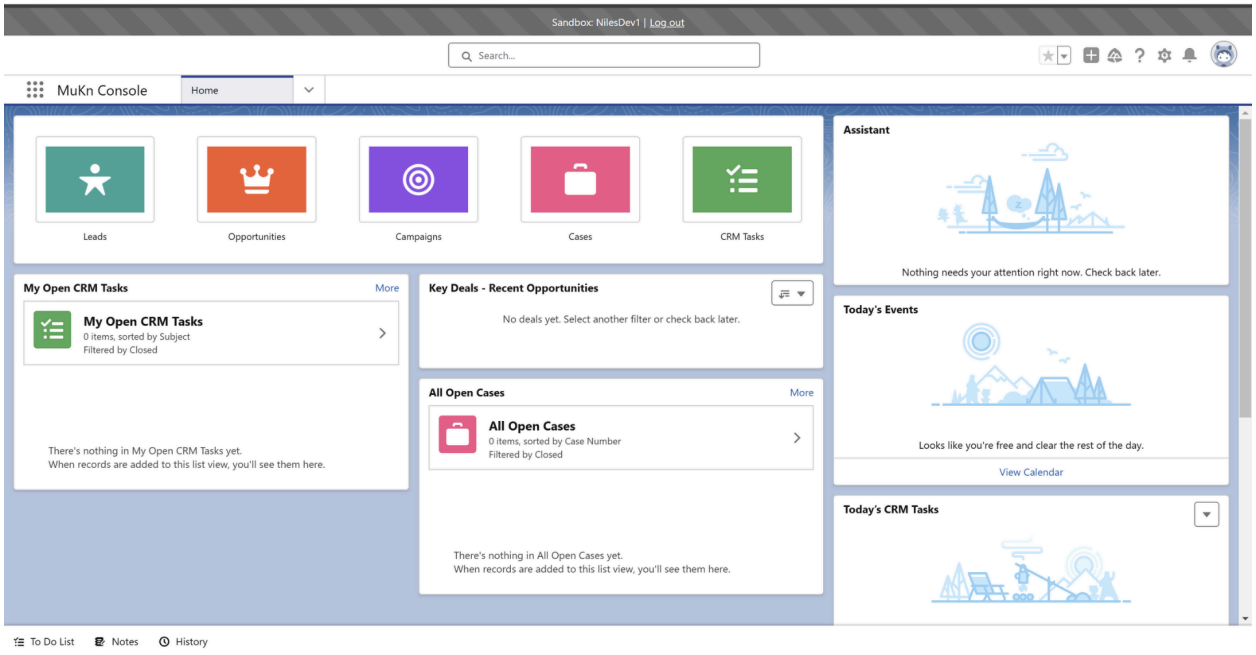
Configuration Instructions (Screenshots)

If you are more comfortable with a visual guide the following are full detailed screenshots of the Configuration step by step found above.

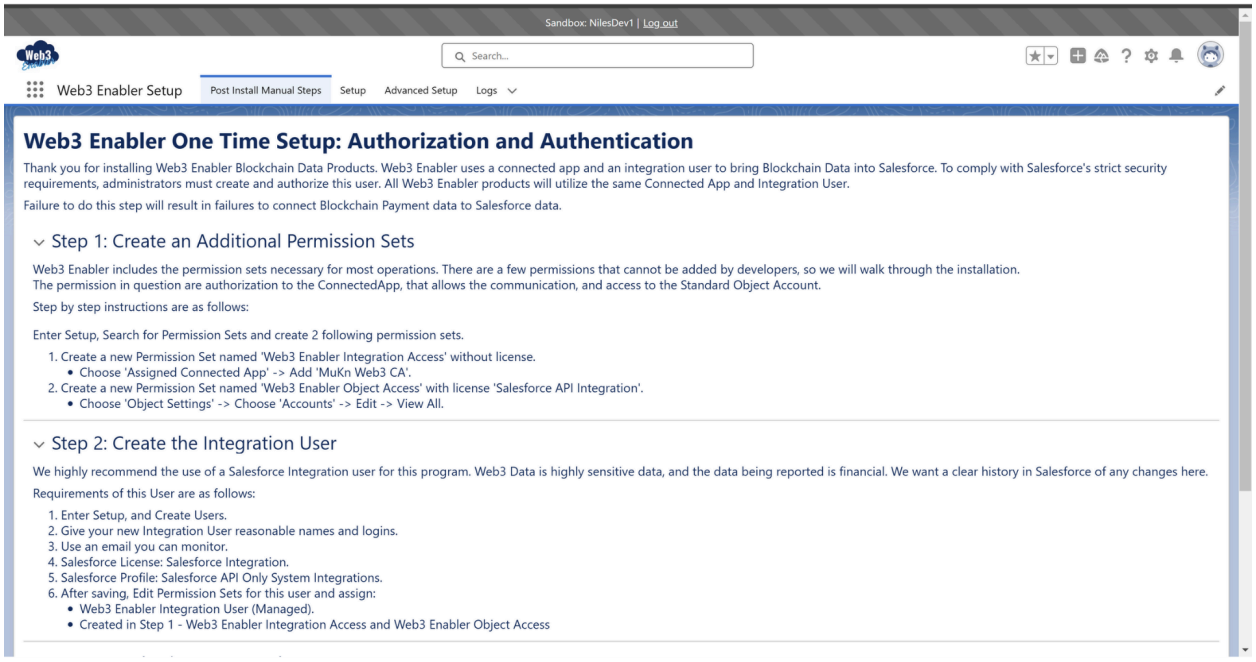
Open Web3 Enabler Setup

Remember, there are two Web3 Enabler apps installed for Blockchain Payments; Web3 Enabler Blockchain Payments and Web3 Enabler Setup. Before you are able to properly use Web3 Enabler Blockchain Payments you MUST configure Web3 Payments Setup first.

1. Go to Salesforce



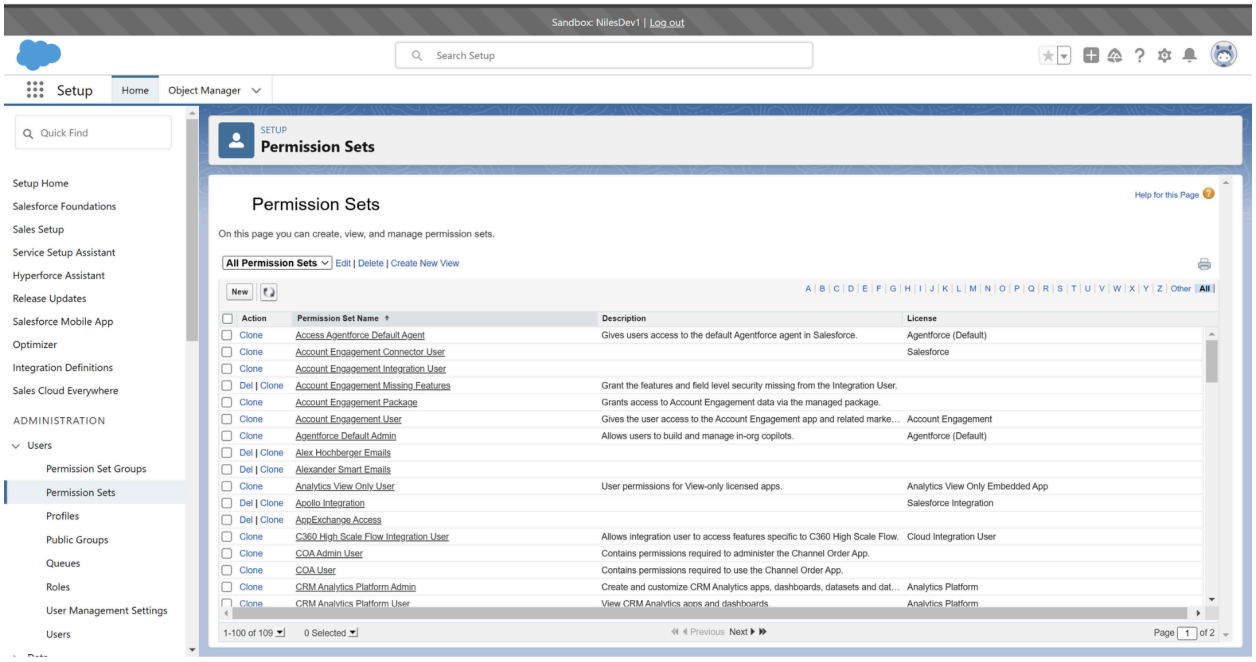
2. Open Web3 Enabler Setup



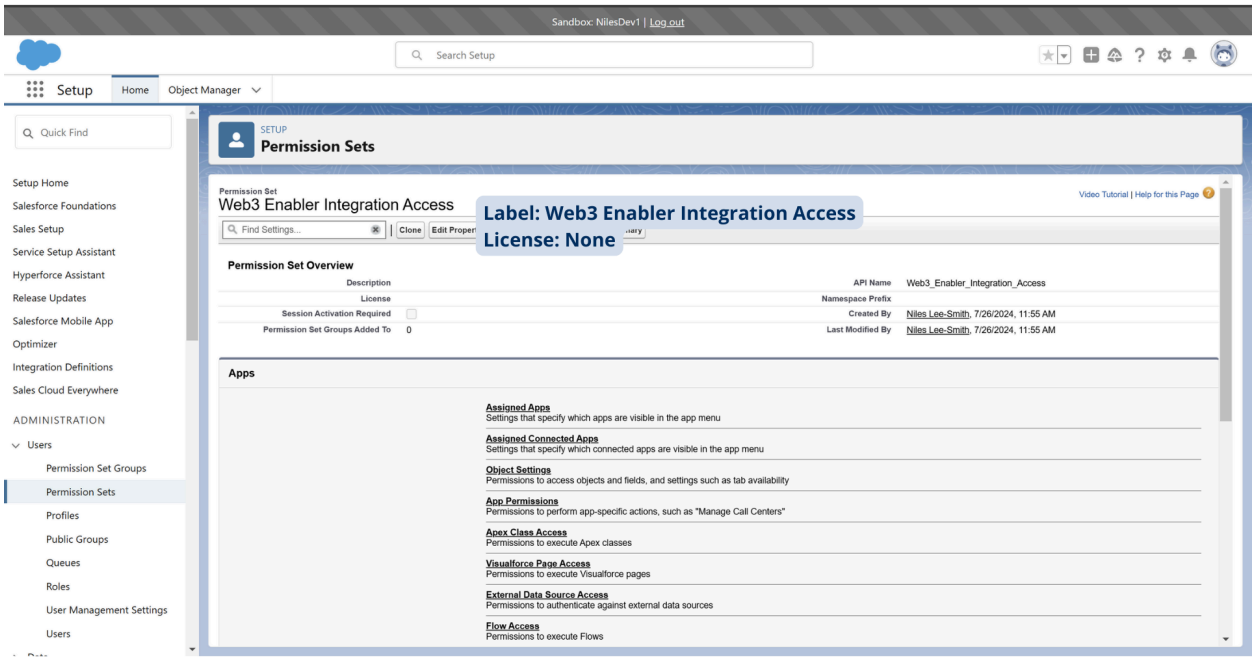
Create Additional Permissions Sets

Creating these two Permission Sets is required to use a Salesforce Integration user for this program.

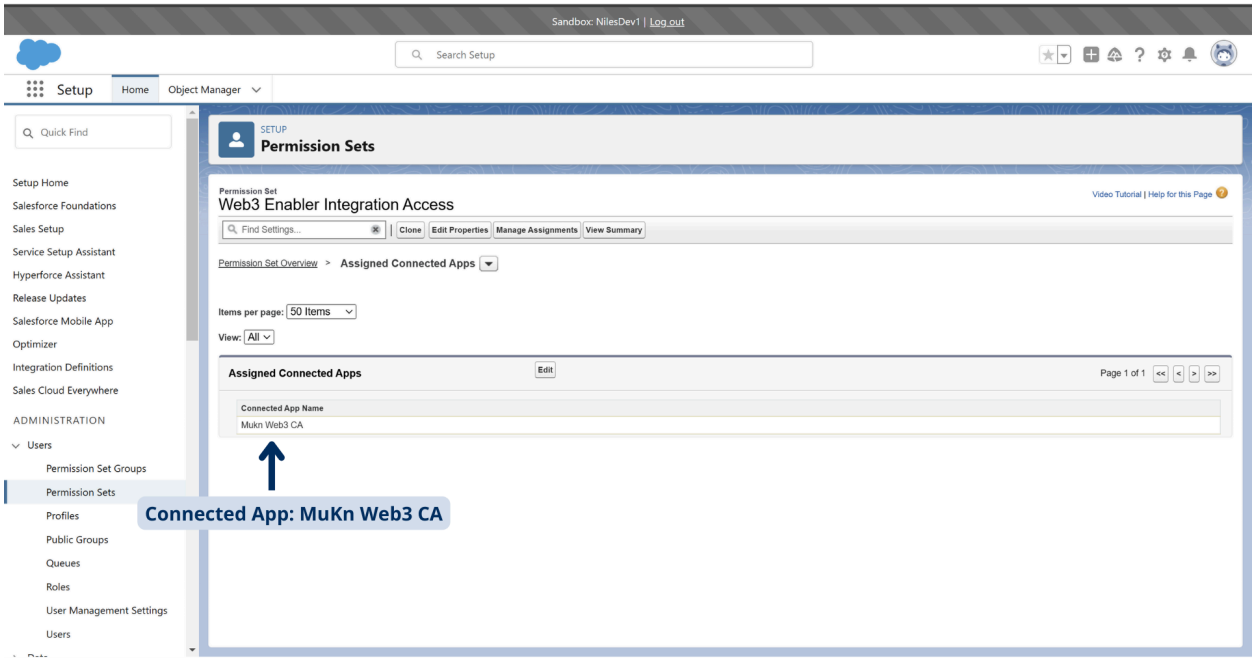
1. Enter Setup, and “Users” -> “Permissions Sets.”



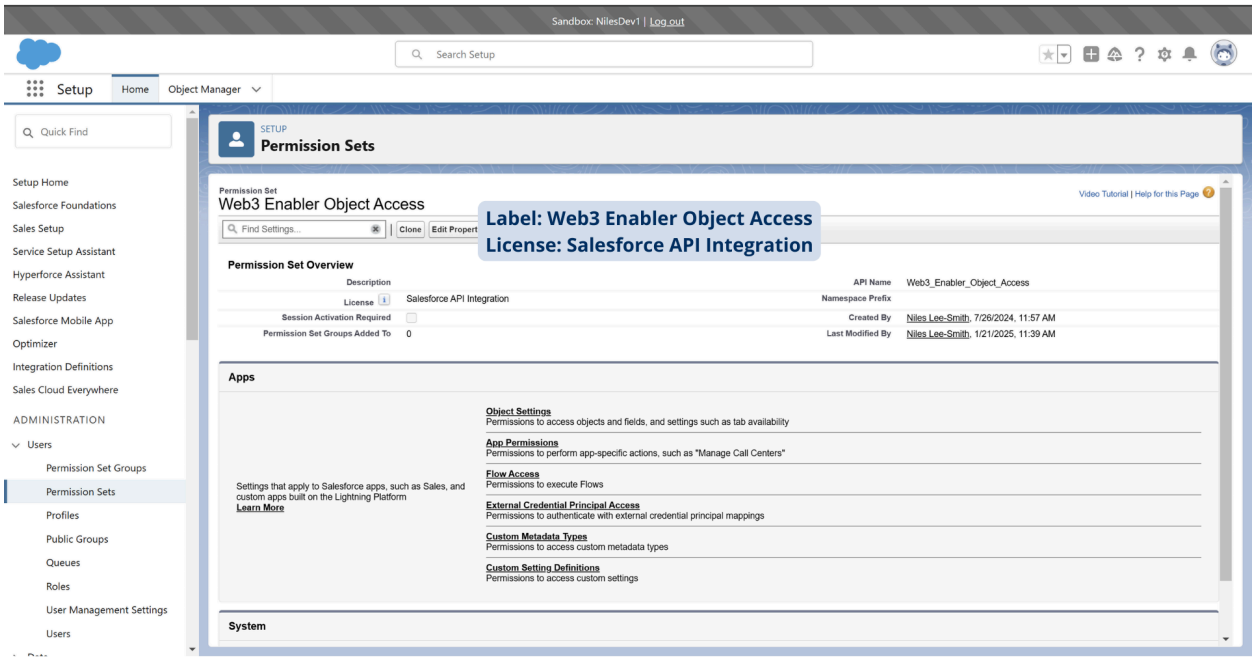
2. Create a new Permission Set with the following;
Label: Web3 Enabler Integration Access
License: None



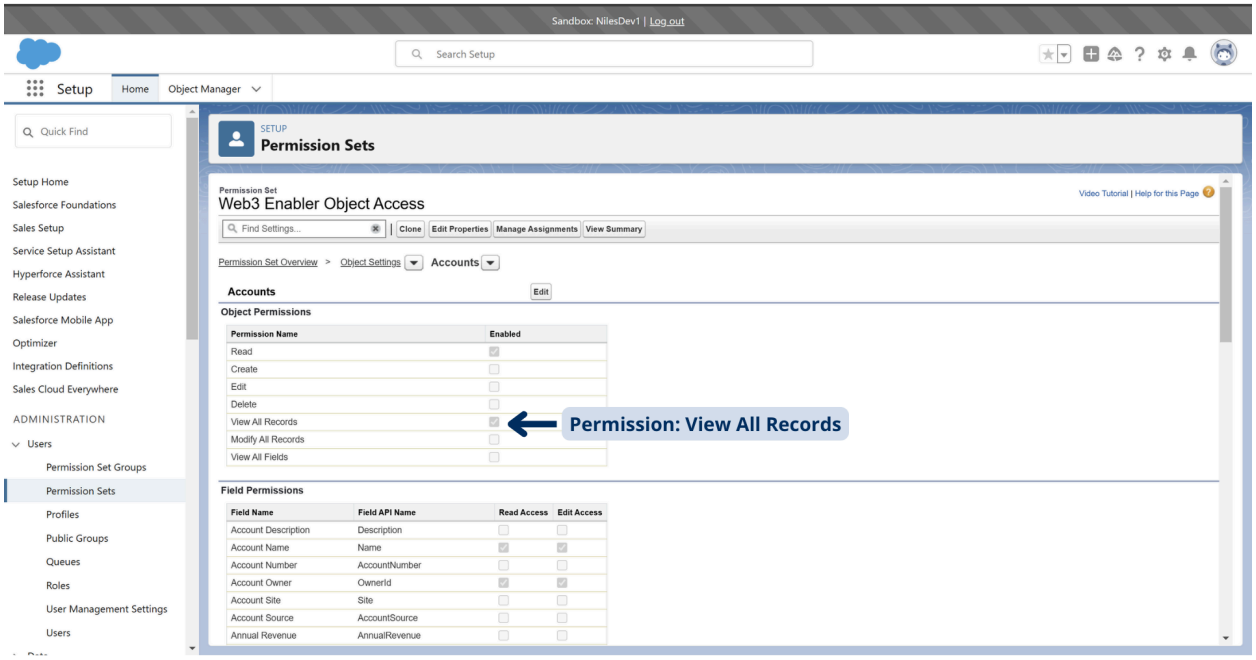
3. Enter “Assigned Connected Apps” and add “MuKn Web3 CA” as a connected app.



4. Create a new Permission Set with the following;
Label: Web3 Enabler Object Access
License: Salesforce API Integration



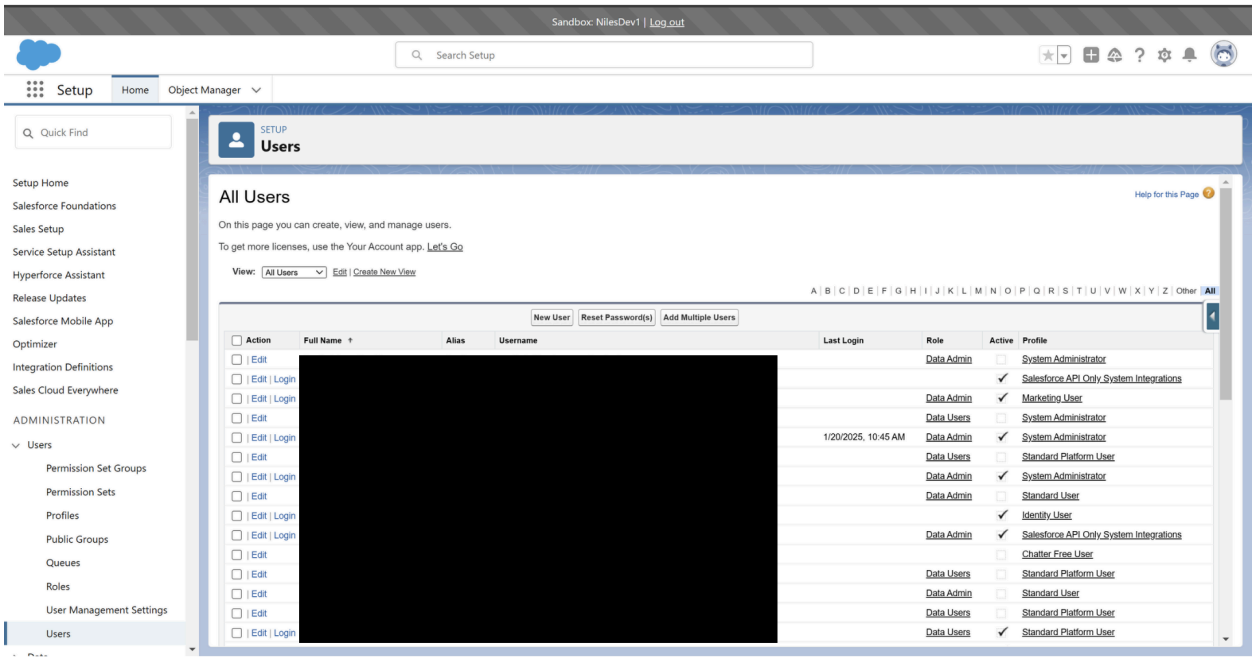
5. Enter “Object Settings” and enable “View All Records,” (this will also enable “Read” by default”).



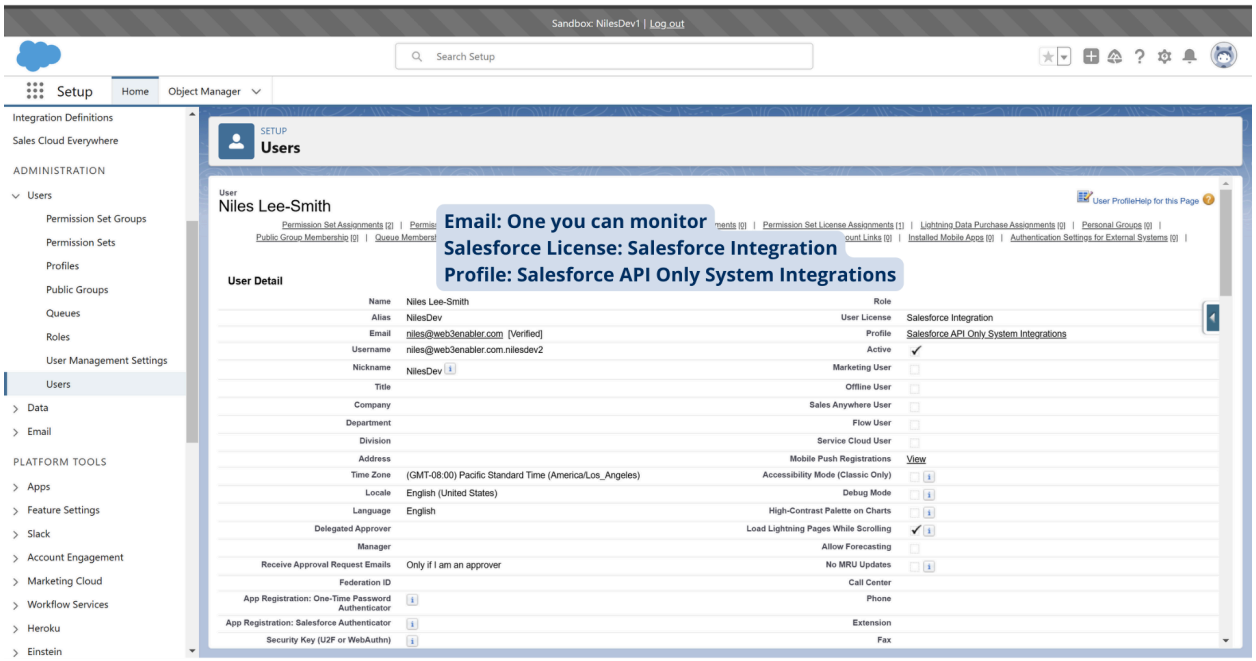
Create/Choose a Salesforce Integration User

Creating a new user is required to use a dedicated integration user. This is recommended. Otherwise, you may use a normal user. This is NOT recommended.

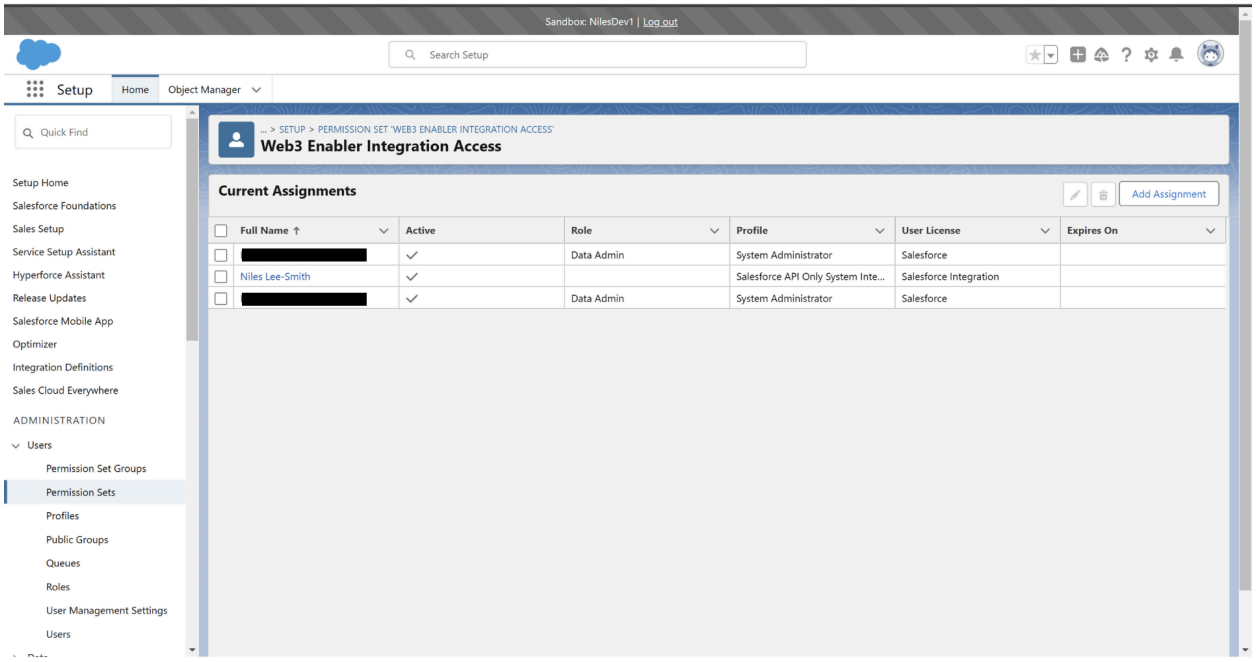
1. Enter “Users” -> “Users.”



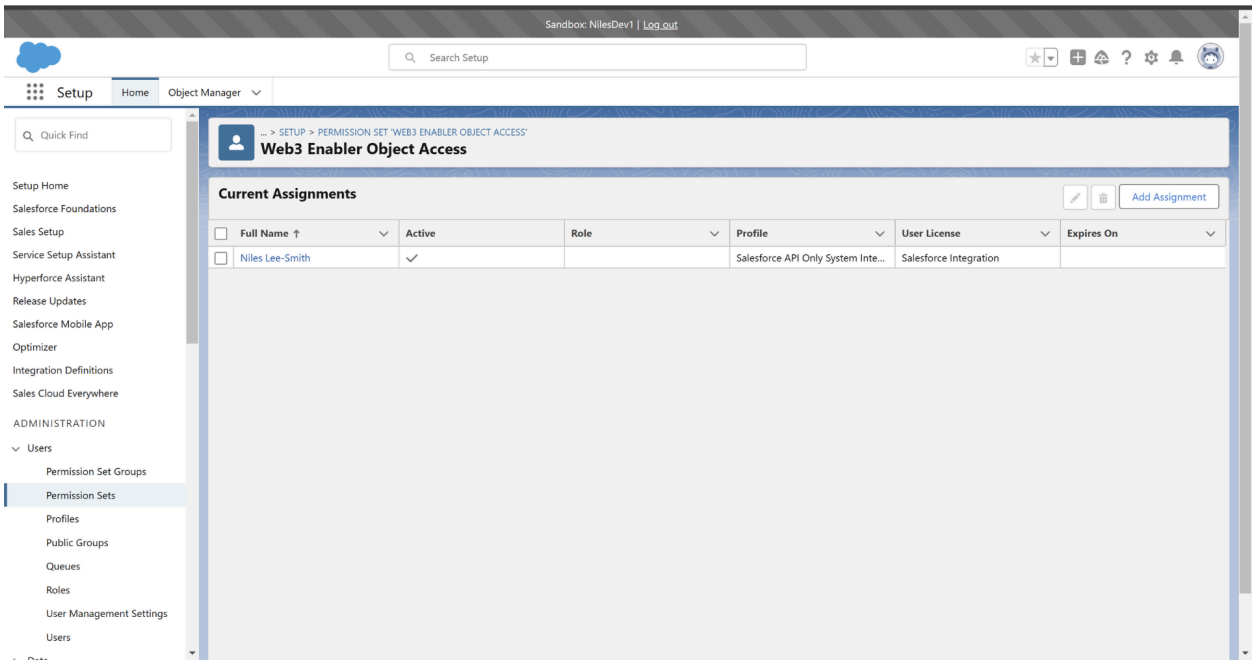
2. Create a new user as the dedicated Integration User with the following;
Email: One you can monitor
Salesforce License: Salesforce Integration
Profile: Salesforce API Only System Integrations



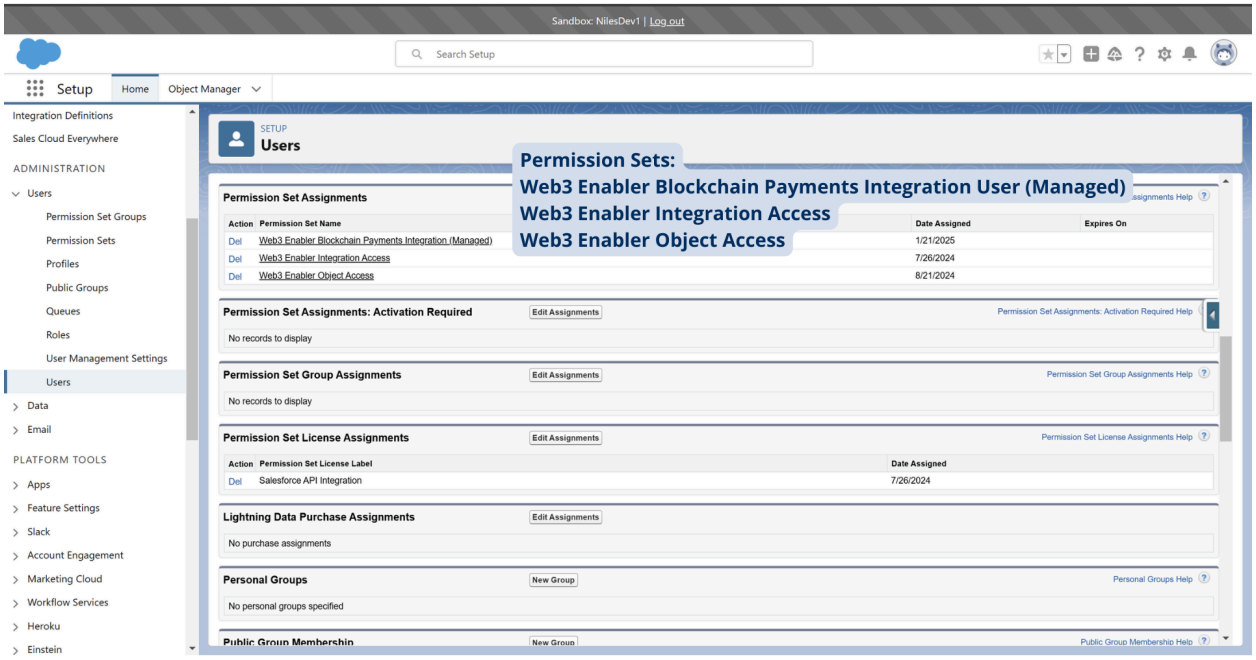
3. Assign the Integration User to the Web3 Enabler Integration Access permission set.



4. Assign the Integration User to the Web3 Enabler Object Access permission set.



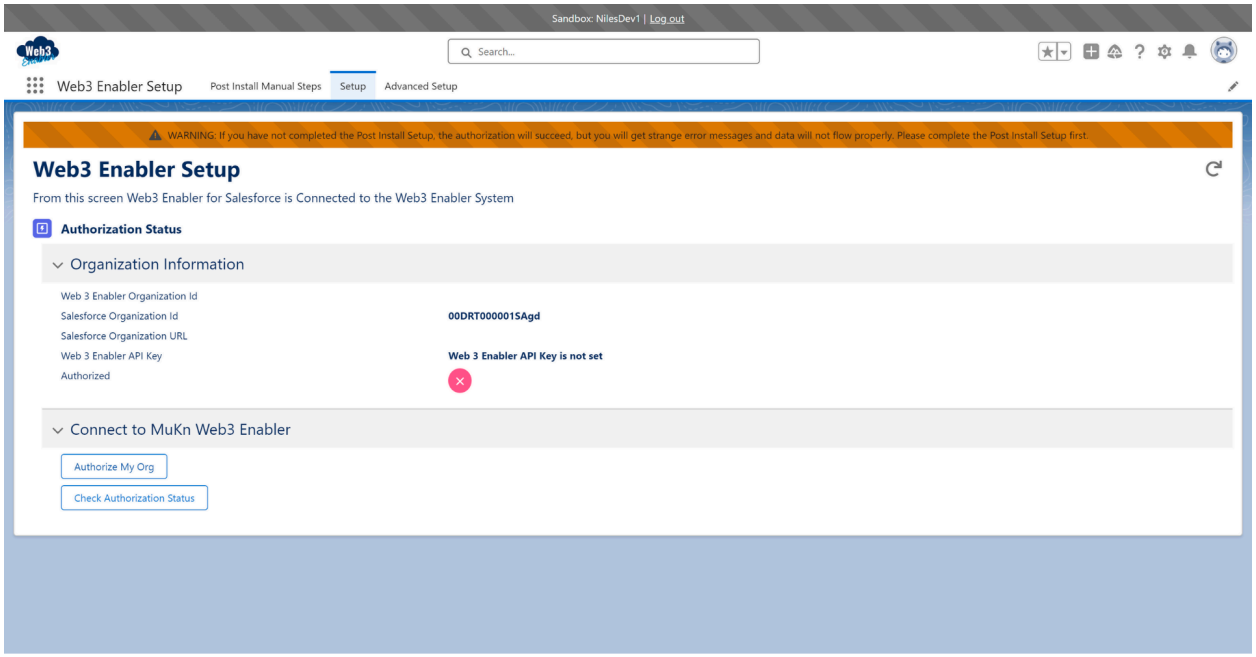
5. Assign “Web3 Enabler Blockchain Payments Integration User (Managed),” Web3 Enabler Integration Access,” and “Web3 Enabler Object Access” to the dedicated Integration User. Assign “Web3 Enabler Blockchain Payments Integration User (Managed)” and Connected App (via Profile or Permission Set) to the normal user used for integration.



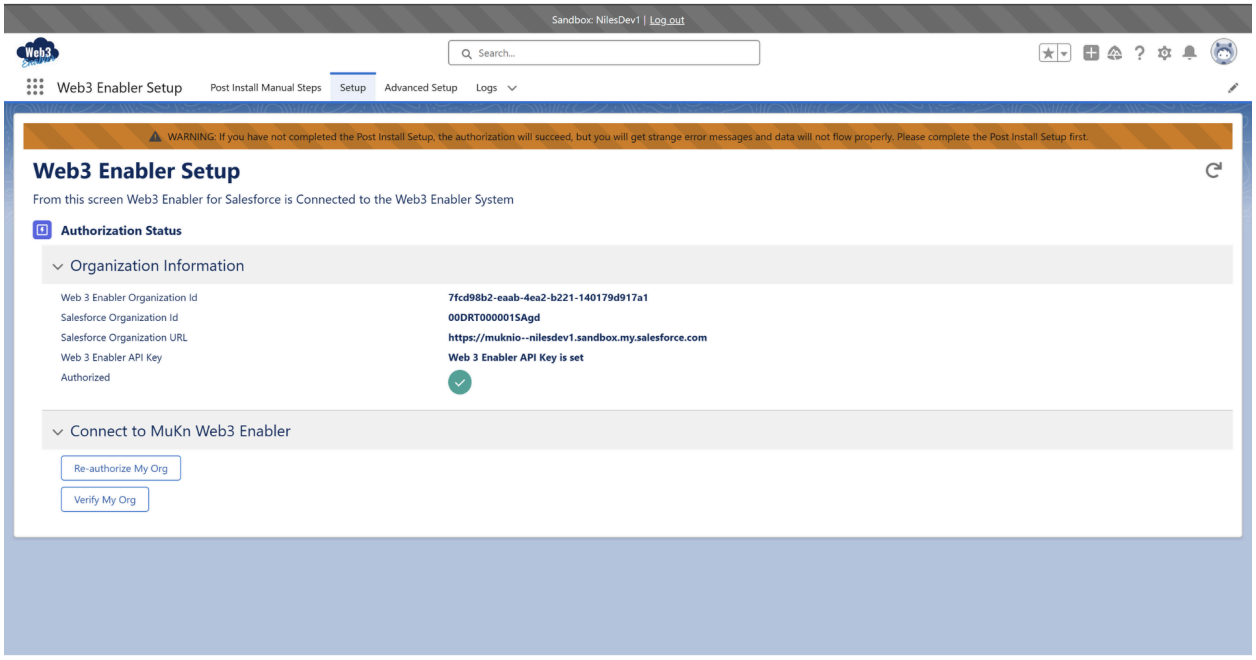
Authorize MuKn Web3 CA

You must authorize the previous prost-installtion setup for authorization will give you an error message and data will not flow properly.

1. Go to the “Setup” tab in Web3 Enabler Setup.



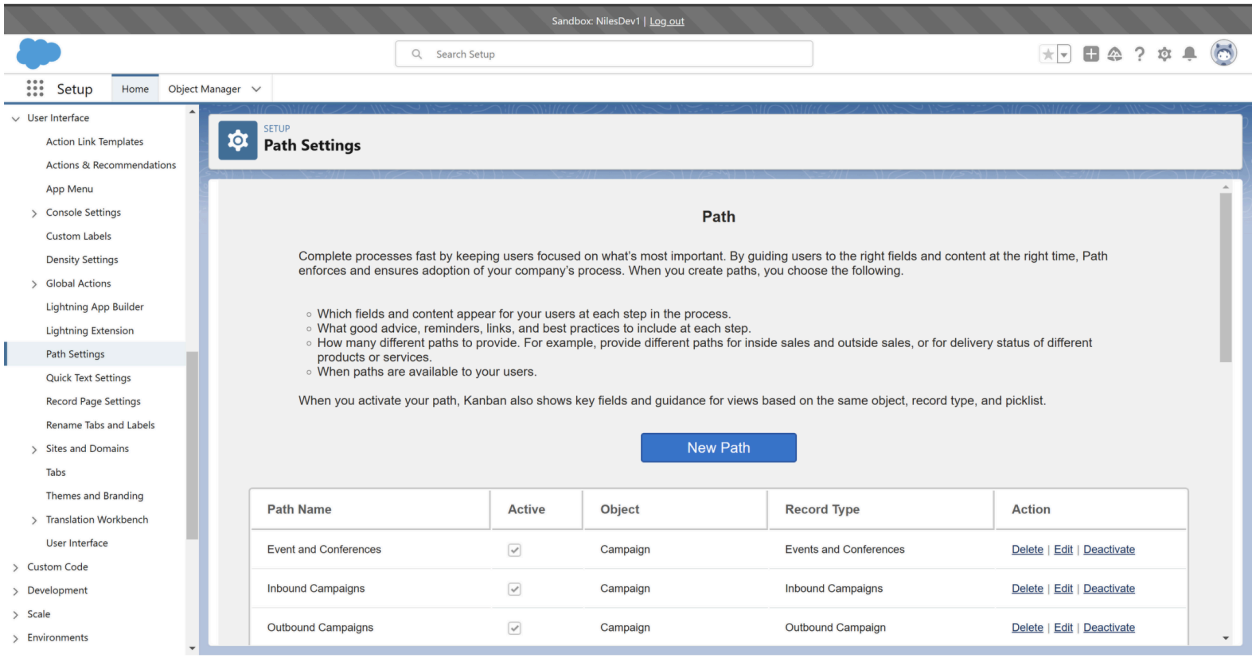
2. Click “Authorize My Org” (recommended in incognito mode), the integration user logs in, and allows MuKn Web3 CA access. Refresh the page to view authorization.



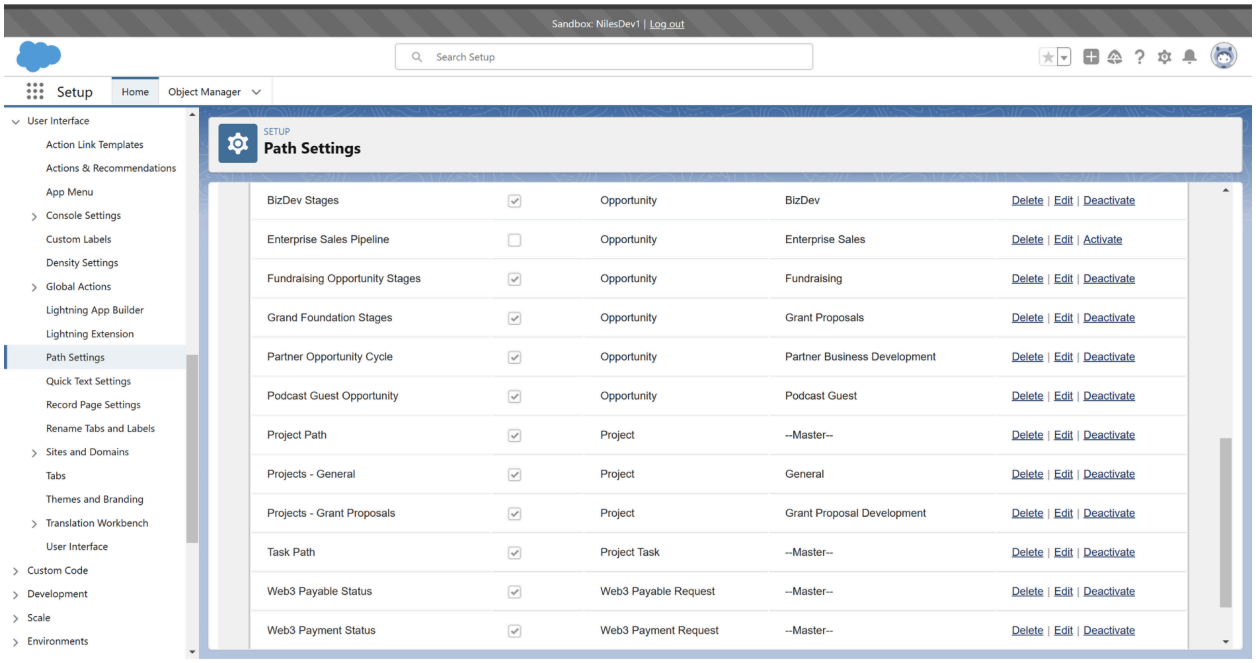
Activate Paths in your Salesforce Organization

Paths help to boost productivity. They guide users through the steps of the business process, such as working on Web3 Payment.

1. Enter Setup, and “User Interface” -> “Path Settings.”



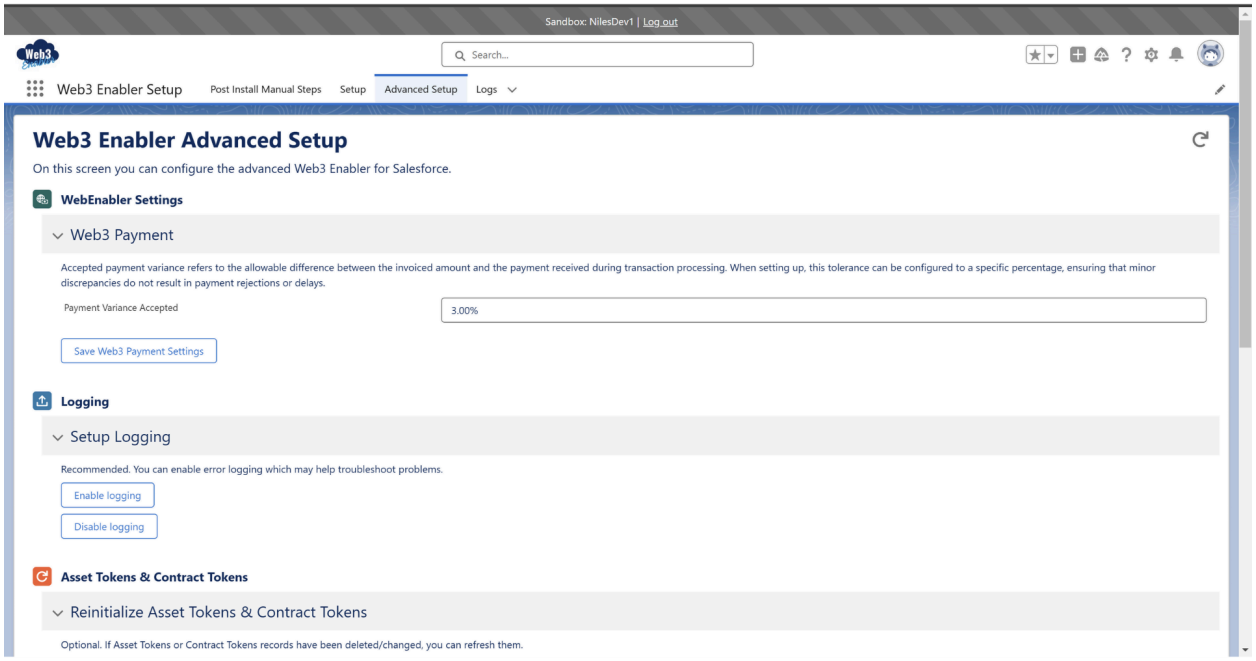
2. Enable paths you would like to use.



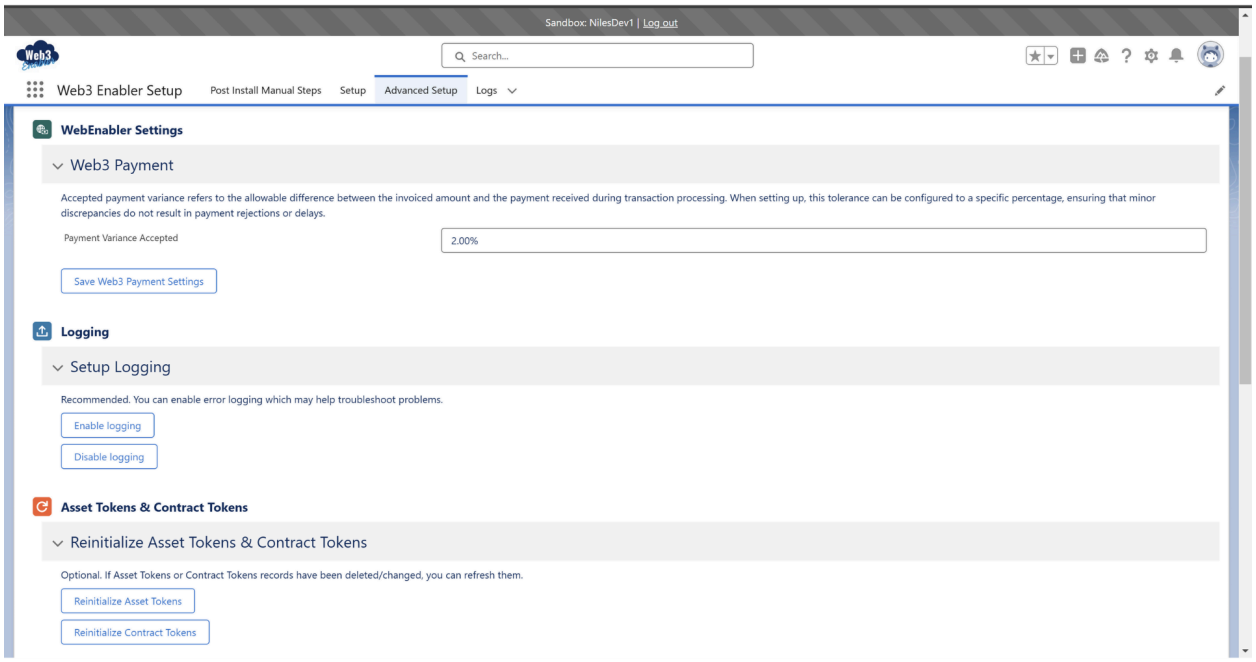
Configure Advanced Setup (Optional)

It is recommended to complete the advanced setup even if it is optional. There are additional tools you can adjust or incorporate into your Web3 Enabler Blockchain Payments.

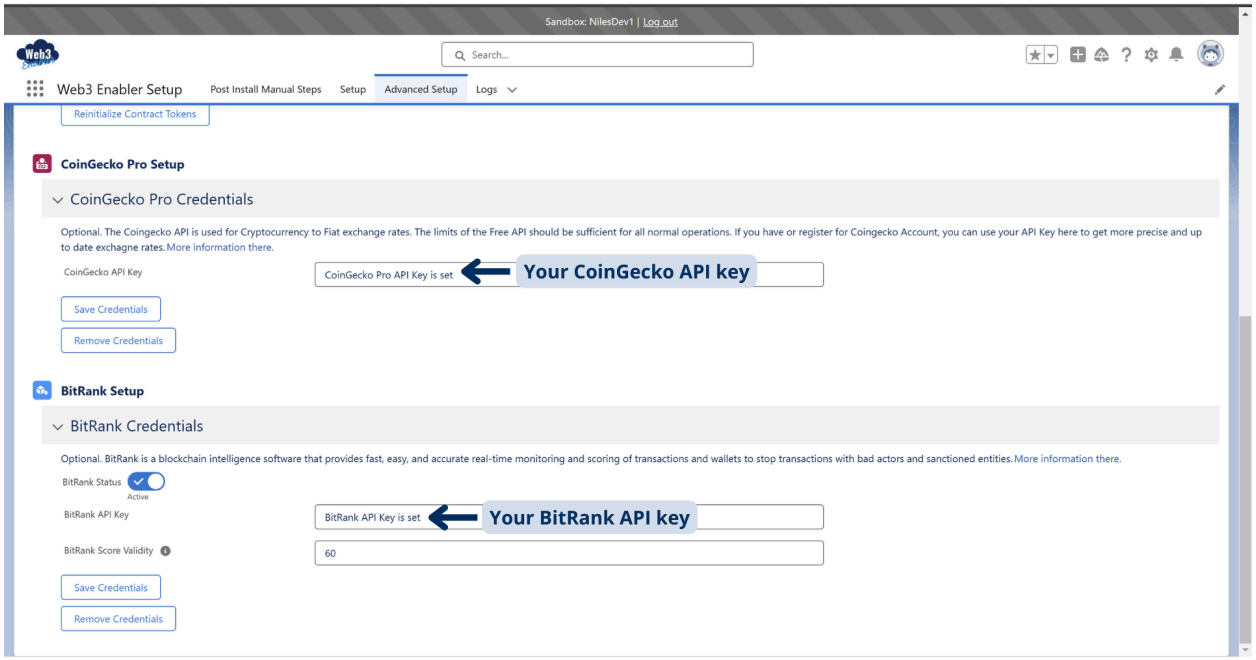
1. Go to the “Advanced Setup” tab in Web3 Enabler Setup.



2. You may adjust the payment variance (the allowable difference between the invoiced amount and the payment received during transaction processing), enable error logging to help troubleshoot problems, and reinitialize asset and contract tokens that may have been deleted or changed.



3. You may enter and save your CoinGecko API key for periodic cryptocurrency price adjustments and your BitRank API key to monitor and score transactions and wallets to stop transactions with bad actors or sanctioned entities.



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.