Blockchain Payments for Salesforce

Web3 Enabler

User Guide V3.0

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.

Objects Guide (Quick Start)

Org Wallet (Org_Wallet__c)

Purpose: Your organization's cryptocurrency wallets for receiving and sending payments.Key Features:

- Multi-network support (Bitcoin, Ethereum, Polygon, etc.)
- Test and production environment configuration
- Wallet address management for each supported network
- Record types for different wallet purposes (Main, Liquidation, etc.)

Primary Use Cases:

- Setting up your organization's cryptocurrency wallets
- Configuring wallet addresses for different blockchain networks
- Managing test vs. production wallet environments

Account Wallet (Account_Wallet__c)

Purpose: Customer cryptocurrency wallets within your Salesforce org for receiving payments.Key Features:

- Links to Salesforce Account records
- Supports multiple blockchain networks per customer
- Generates QR codes for mobile payments
- Record types for different customer wallet types (Standard, Business, etc.)
- Provides secure wallet connection URLs

Primary Use Cases:

- Customer wallet onboarding and management
- Payment address generation and tracking
- QR code generation for mobile payments

Payment Processing Objects

Web3 Payment Request (Payment__c)

Purpose: Tracks incoming payment requests from customers.Key Features:

- Auto-numbered payment requests (Payment-{000000})
- Multi-currency support (crypto and fiat amounts)
- Real-time payment status tracking
- Integration with multiple blockchain networks

Primary Use Cases:

- Creating payment requests for customers
- Tracking payment status and amounts
- Generating payment URLs and QR codes

Web3 Payable Request (Payable__c)

Purpose: Manages outgoing payments from your organization to customers or vendors.Key Features:

- Auto-numbered payable requests (Payable-{000000})
- Multi-currency support for outgoing payments
- Integration with Bridge API for fiat off-ramping
- Status tracking for payment processing

Primary Use Cases:

- Creating outgoing payment requests
- Managing vendor payments in cryptocurrency
- Tracking payment processing status

Asset Management

Asset-Token (Asset_Token__c)

Purpose: Defines and manages the cryptocurrency assets and tokens your organization accepts.Key Features:

- Multi-network asset support
- Real-time conversion rates from CoinGecko
- Asset status management (active/inactive)

- Conversion rate tracking and updates

Primary Use Cases:

- Configuring which cryptocurrencies to accept
- Managing conversion rates for pricing
- Enabling/disabling specific assets

Bridge Integration Objects

Bridge Entity (Bridge_Entity__c)

Purpose: Manages customer entities for Bridge API integration, enabling fiat off-ramping and banking services.Key Features:

- Customer entity management for Bridge
- KYC/KYB process tracking
- Banking integration support

Primary Use Cases:

- Customer onboarding for fiat services
- KYC/KYB compliance
- Banking integration setup

Bridge External Account (Bridge_External_Account__c)

Purpose: Manages customer bank accounts for fiat off-ramping through Bridge API integration.Key Features:

- Bank account management
- Account verification status
- Integration with Bridge API

Primary Use Cases:

- Setting up customer bank accounts
- Managing payment methods for fiat conversion
- Banking integration for crypto-to-fiat

Bridge Virtual Account (Bridge_Virtual_Account__c)

Purpose: Creates virtual accounts for customers to receive fiat payments through Bridge integration.Key Features:

- Virtual account creation
- Fiat payment routing
- Account balance tracking

Bridge Liquidation Address (Bridge_Liquidation_Address__c)

Purpose: Manages addresses for liquidating cryptocurrency holdings into fiat currency.Key Features:

- Liquidation address management
- Fiat conversion tracking
- Integration with Bridge API

Transaction Tracking

Inbound Blockchain Transaction (Inbound_Blockchain_Transaction__c)

Purpose: Records all incoming cryptocurrency transactions to your organization's wallets.Key Features:

- Auto-numbered transaction IDs (IBC-TXN-{00000000})
- Real-time transaction monitoring
- Multi-network support
- Automatic payment reconciliation

Outbound Blockchain Transaction (Outbound_Blockchain_Transaction__c)

Purpose: Records all outgoing cryptocurrency transactions from your organization's wallets.Key Features:

- Auto-numbered transaction IDs (OBC-TXN-{00000000})
- Complete payment audit trails
- Multi-network transaction support
- Integration with payable requests

Users and Permissions

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.

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.

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.

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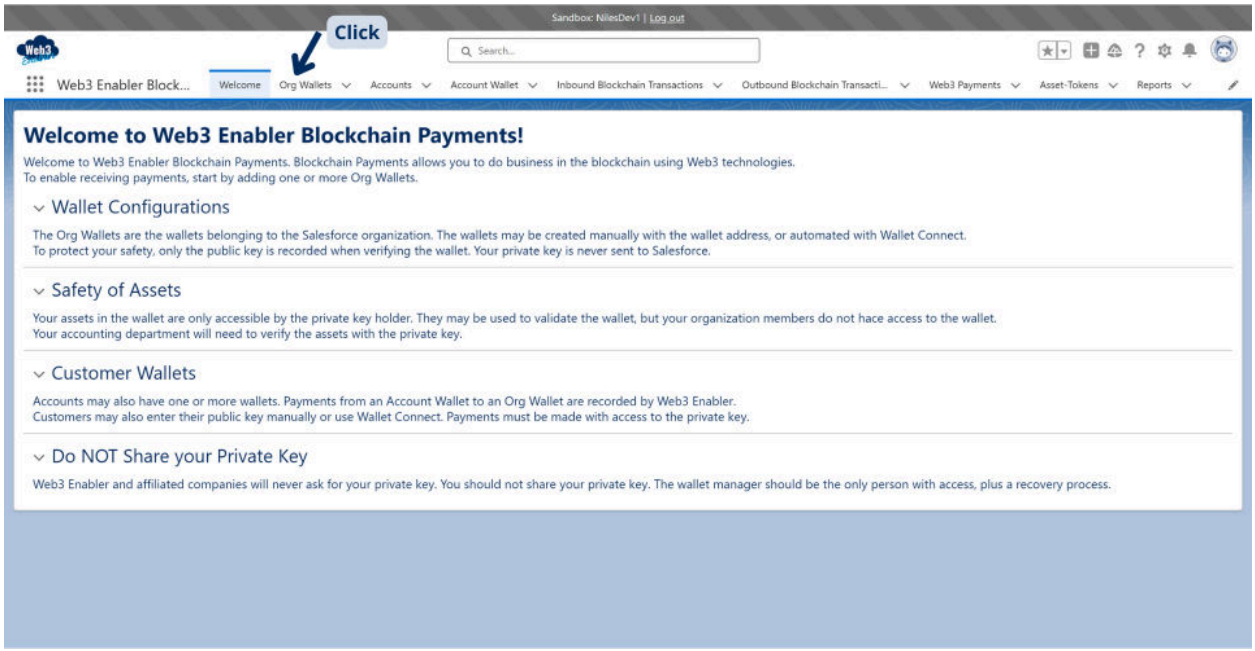
Standard User Guide (Full)

Section 1: Setting Up Organization Wallets

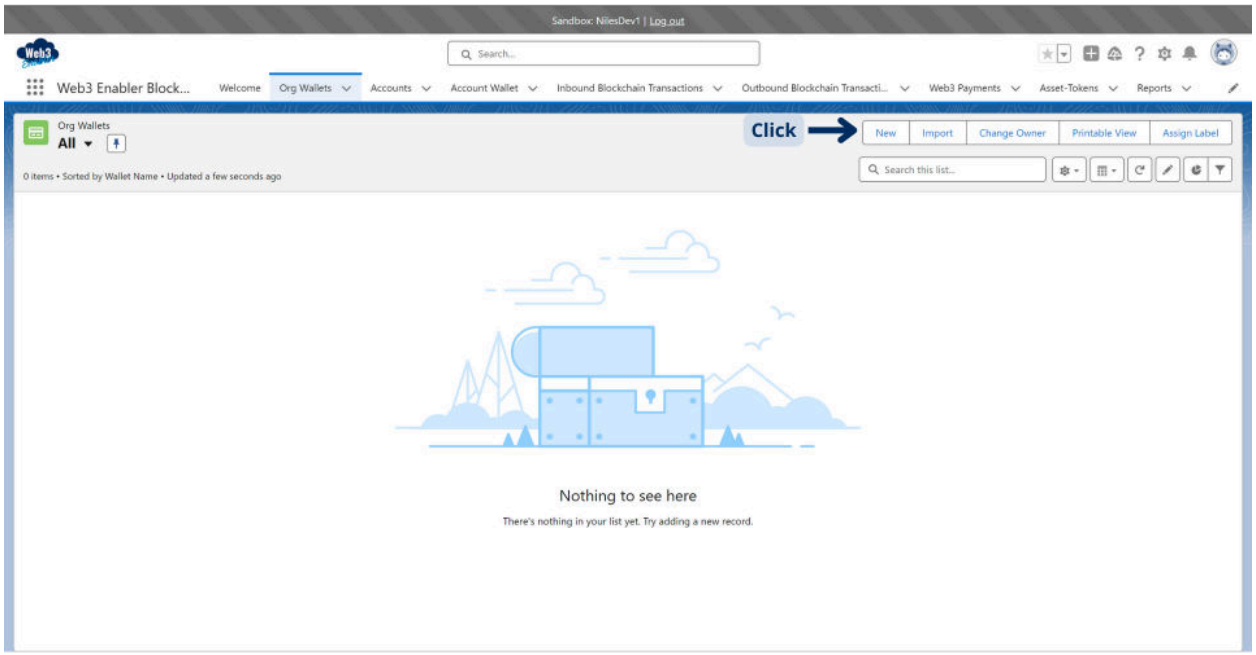
Create an Org Wallet EVM / Account Style Wallet (EVM, Solana, Tron, XRP)

Create and connect an EVM Wallet to your Salesforce Org.

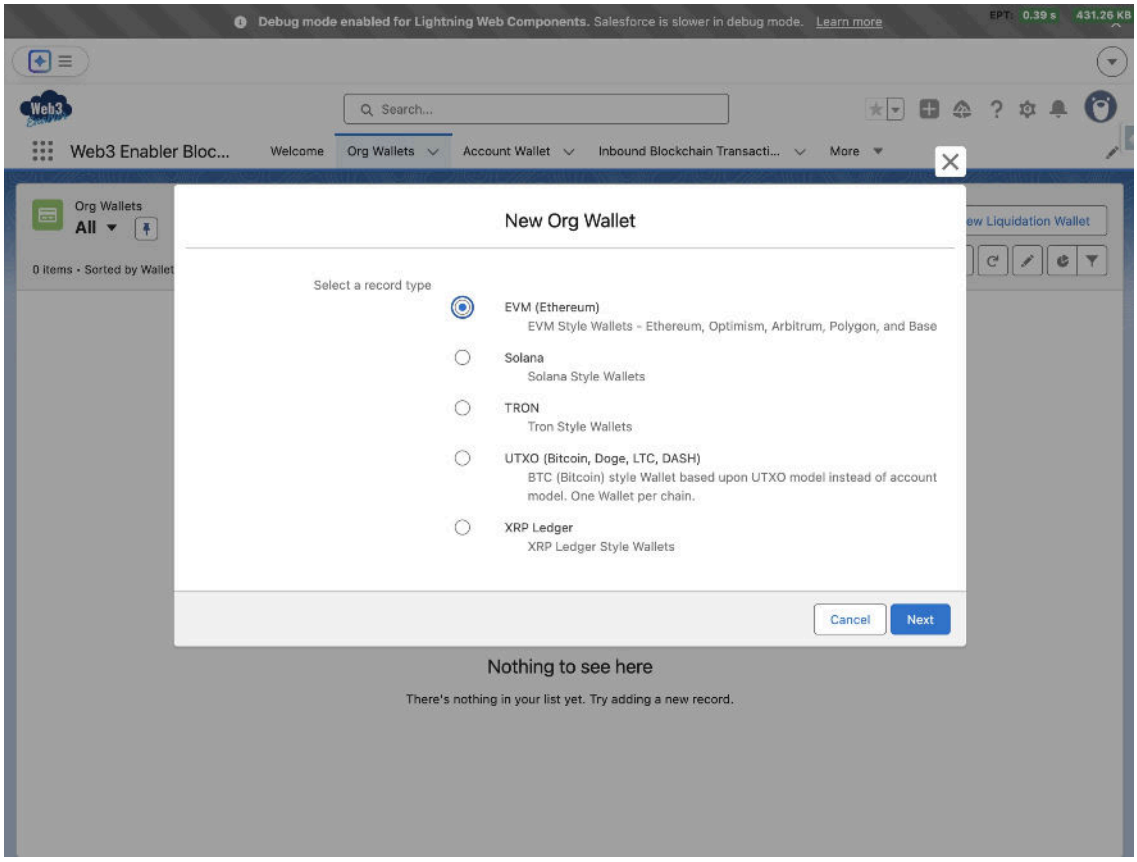
1. Click Org Wallets.



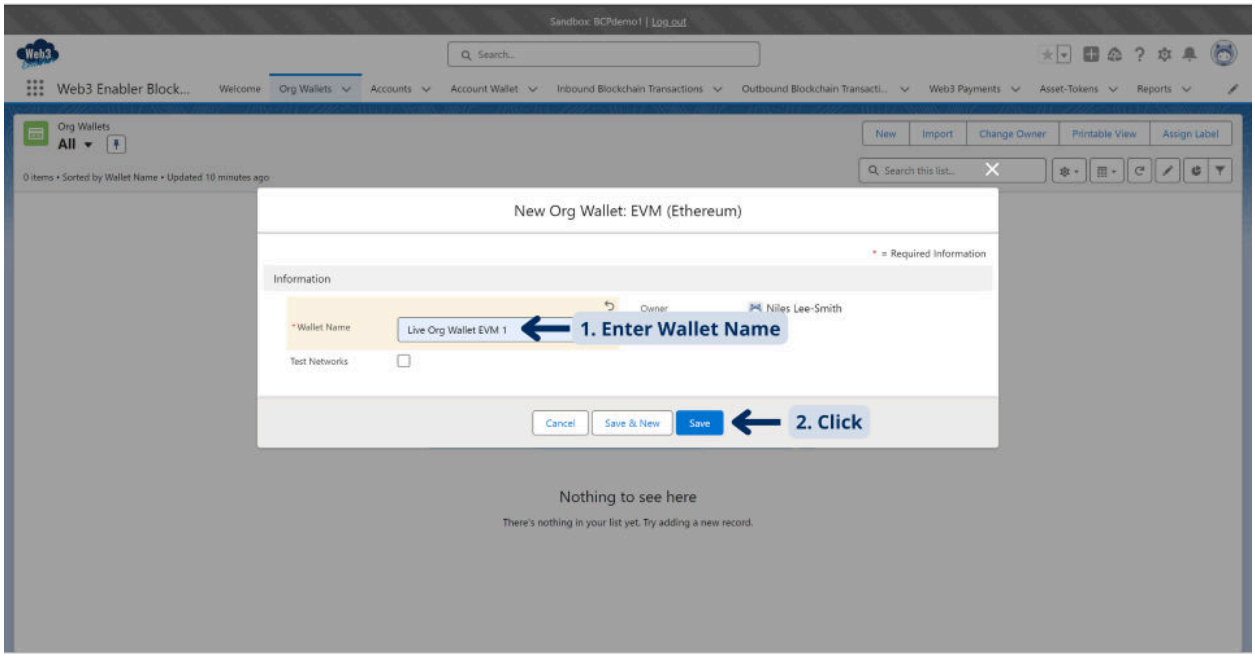
2. Click New.



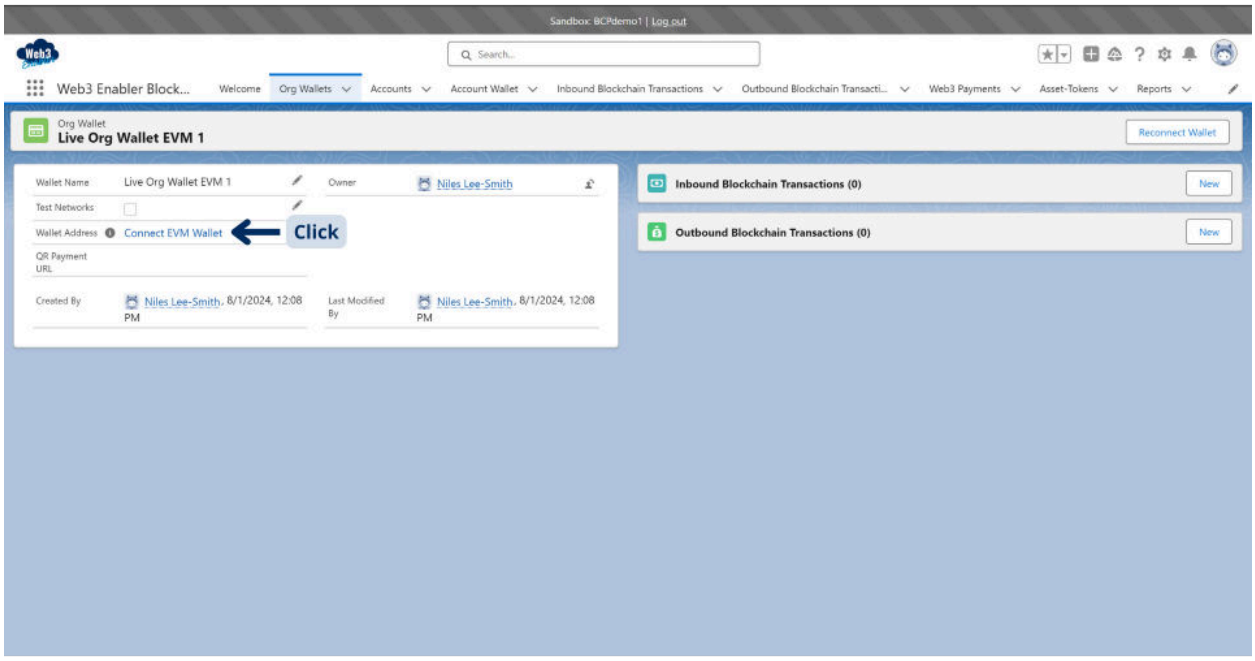
3. Select EVM and click Next.



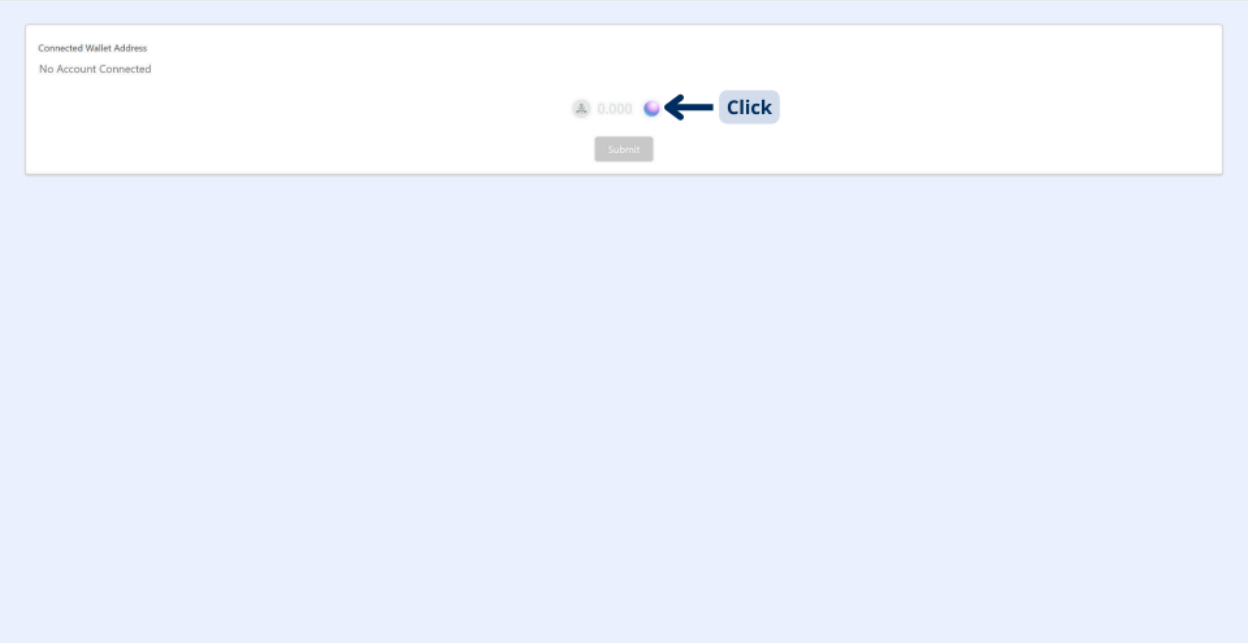
4. Name the new Org Wallet EVM and click Save.



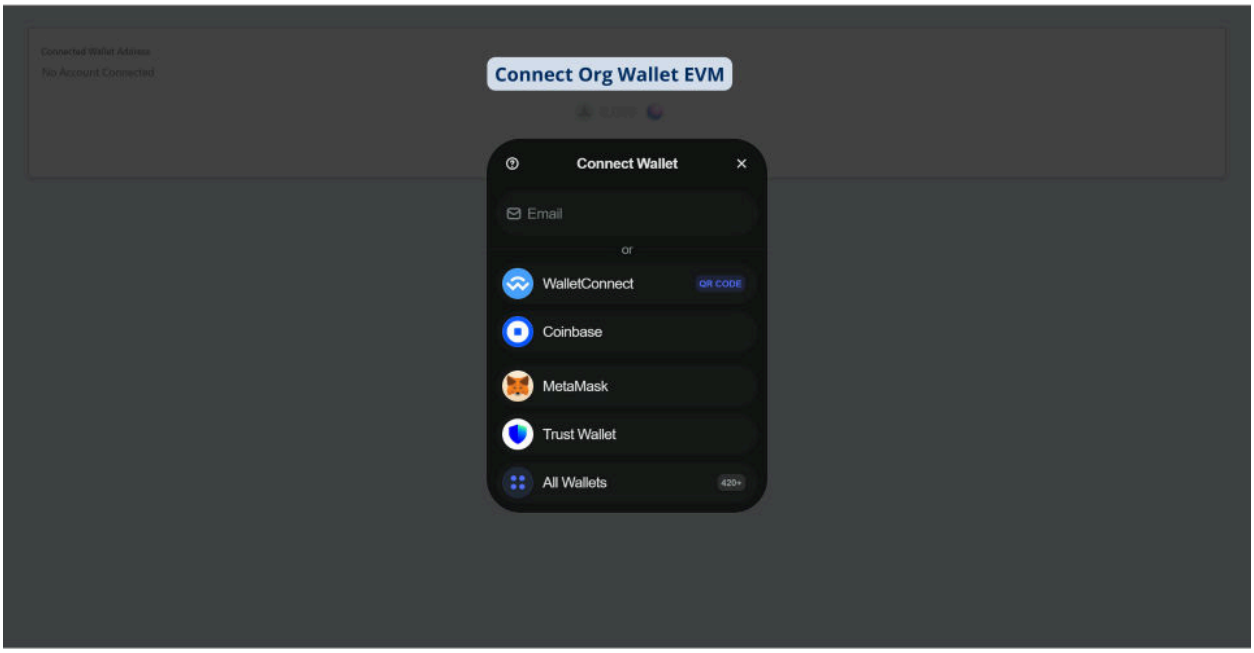
5. Click Connect EVM wallet.



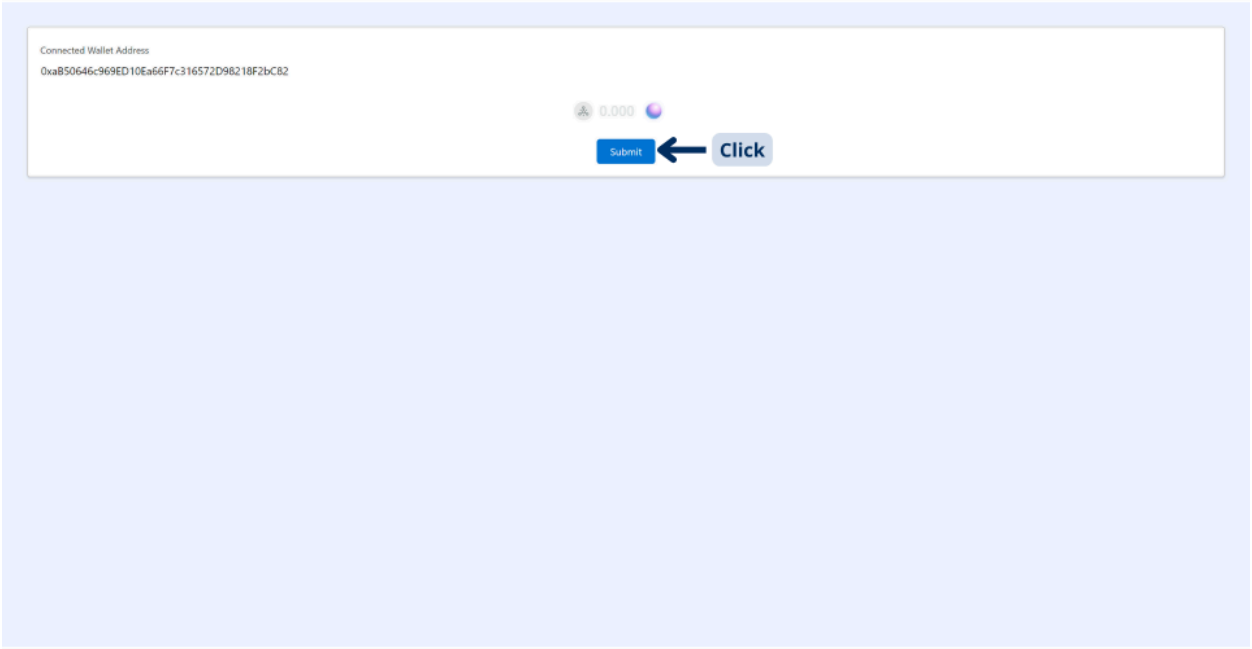
6. Click the circle button.



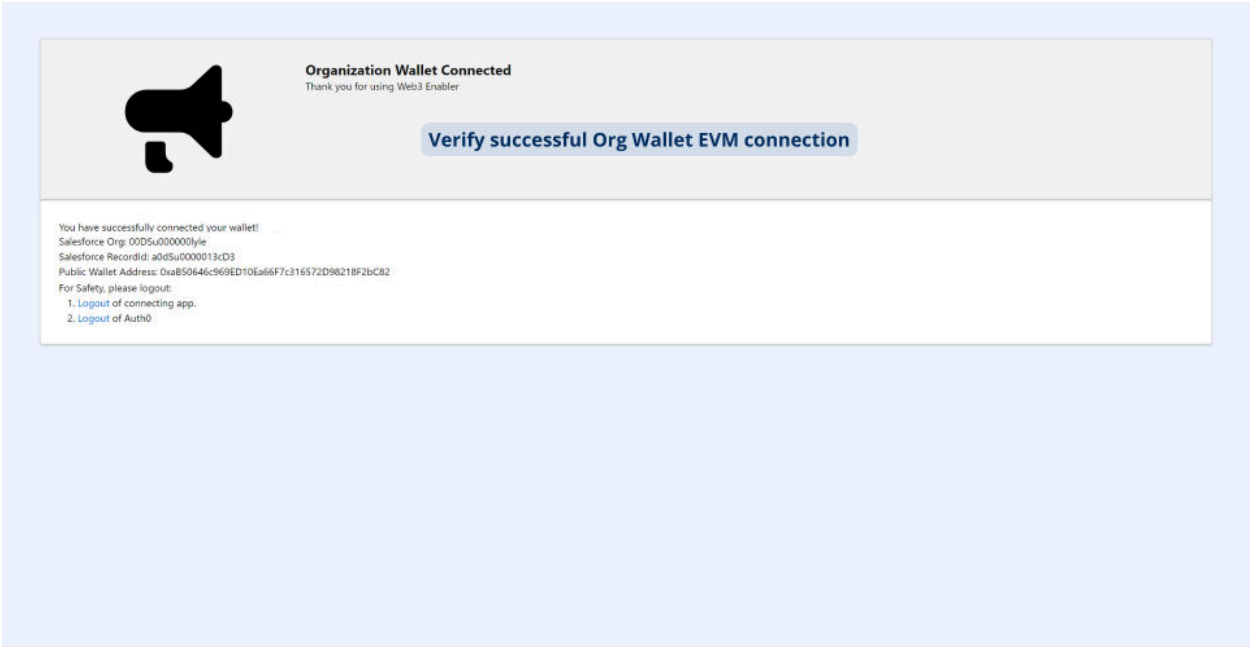
7. Connect Org Wallet EVM.



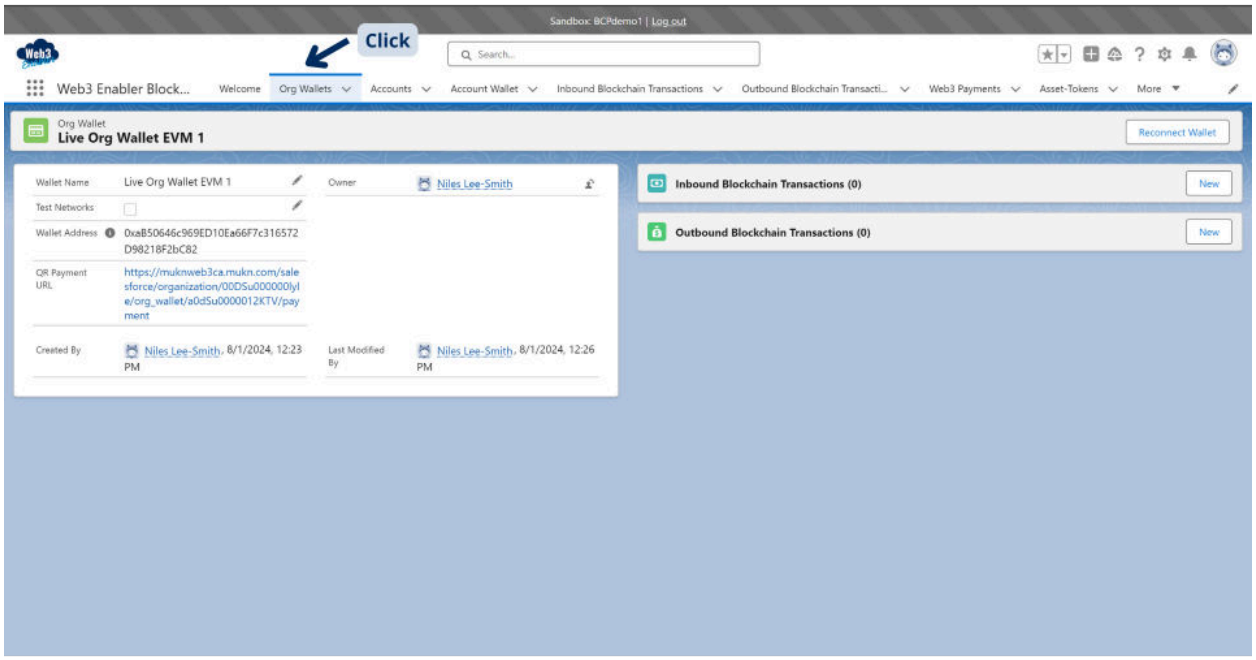
8. Click Submit.



9. View successful Org Wallet EVM connection.



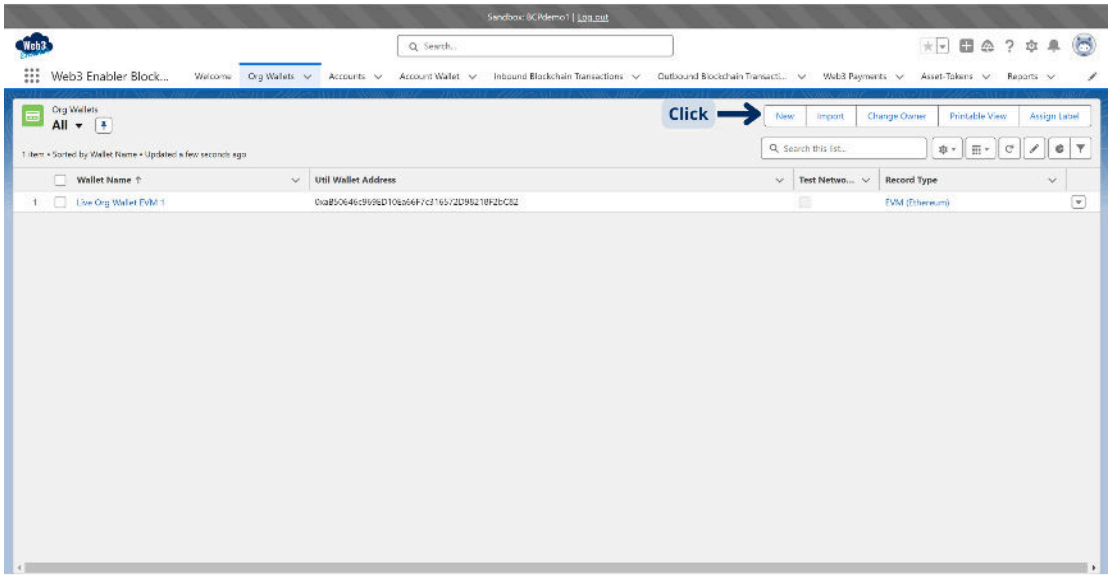
10. Go to Org Wallets and view Org Wallet EVM details and click Org Wallets.



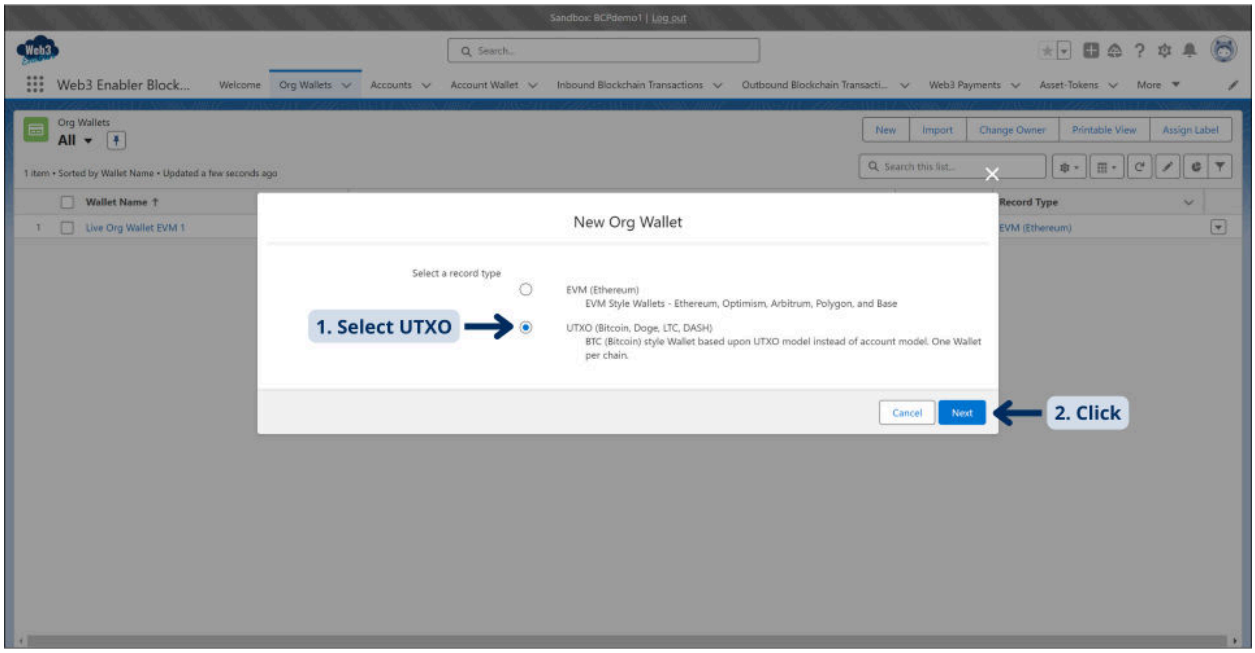
Create an Org Wallet UTXO

Enable the management UTXO style wallets, such as Bitcoin, Doge and Litecoin, from your Salesforce Org Wallet.

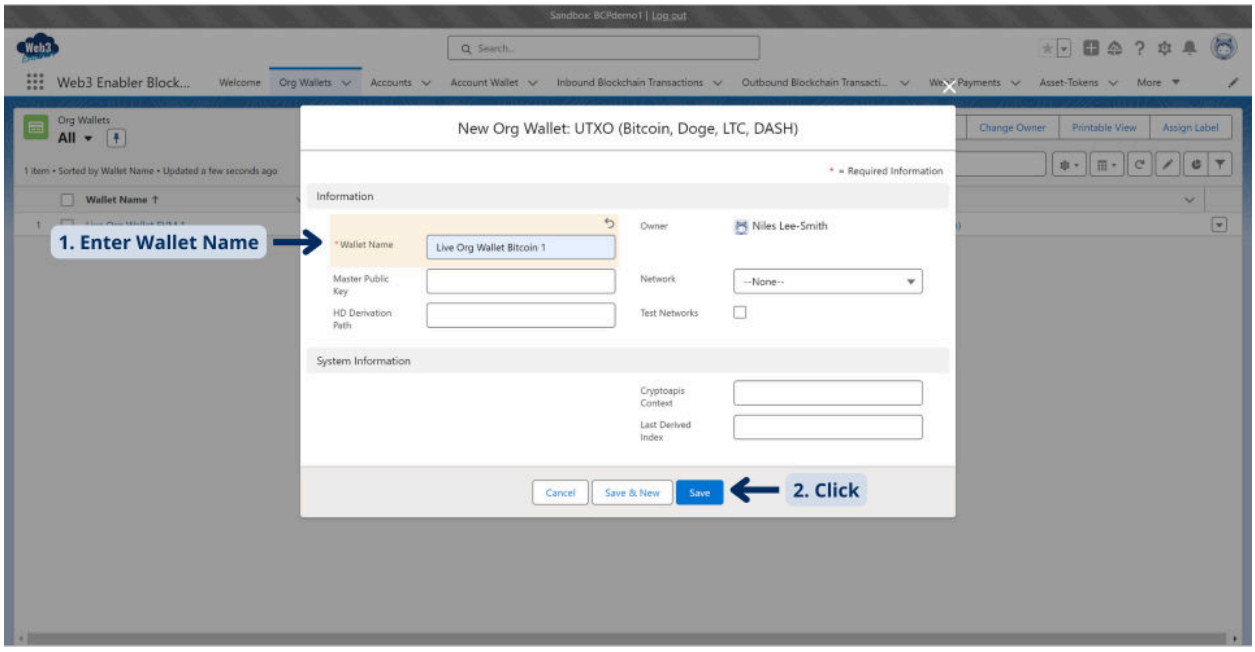
1. Click New.



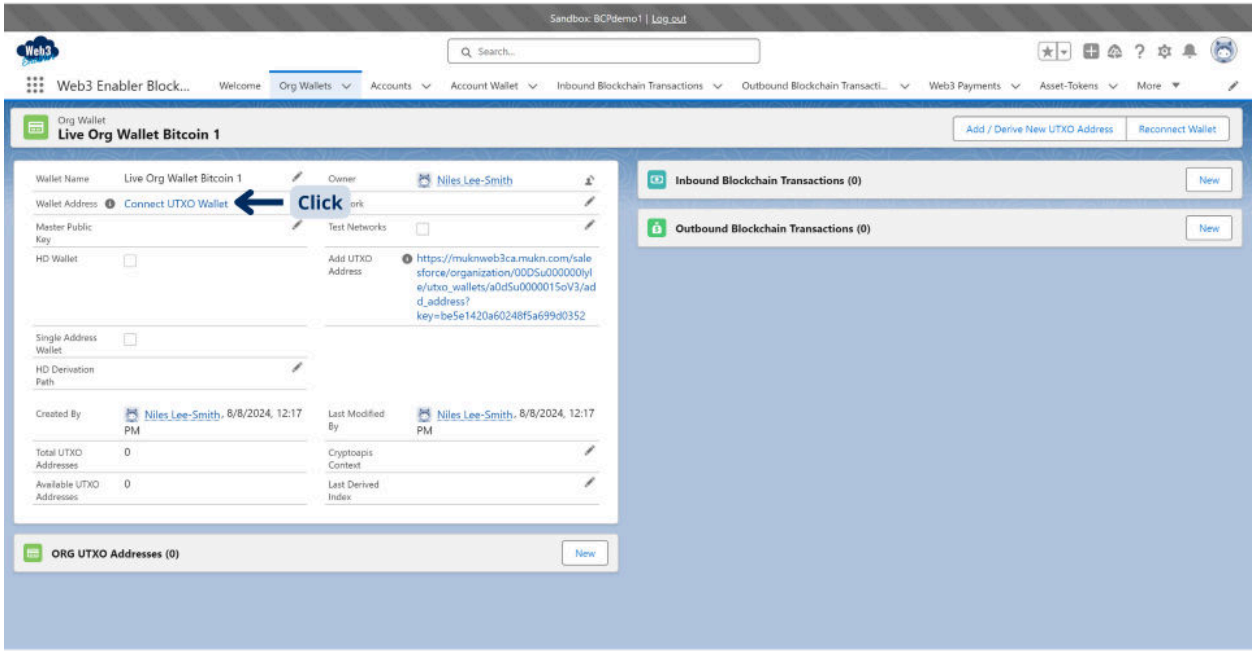
2. Select UTXO and click Next.



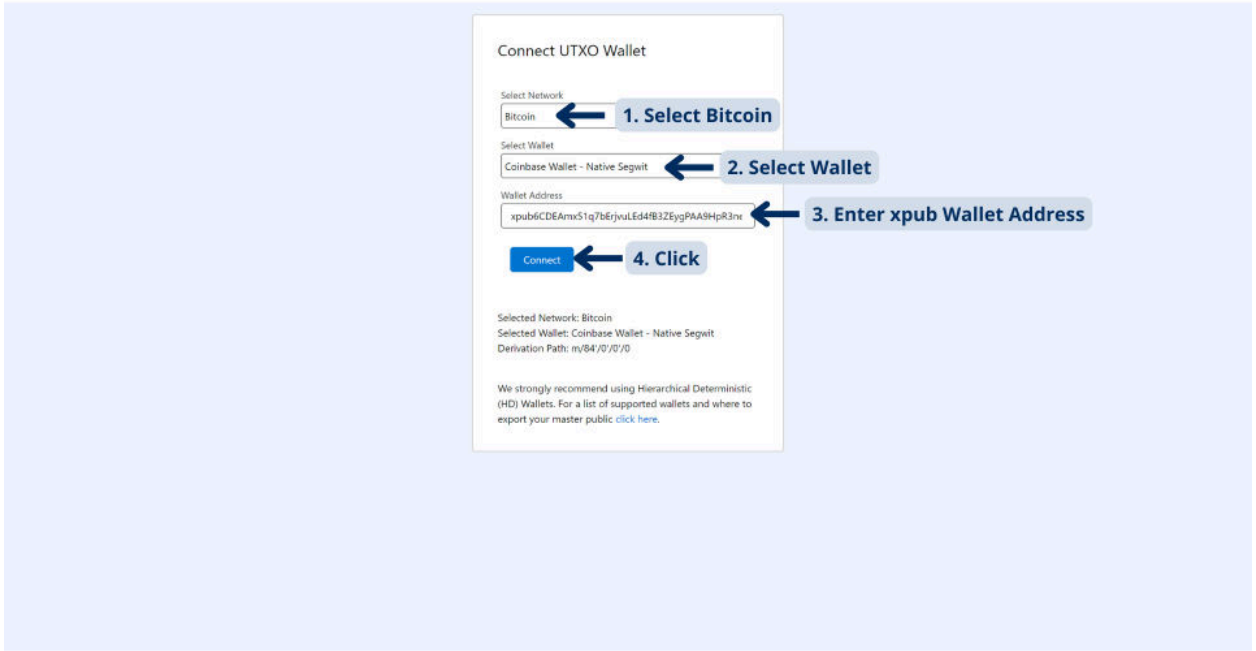
3. Enter Wallet Name and click Save.



4. Click Connect UTXO Wallet.

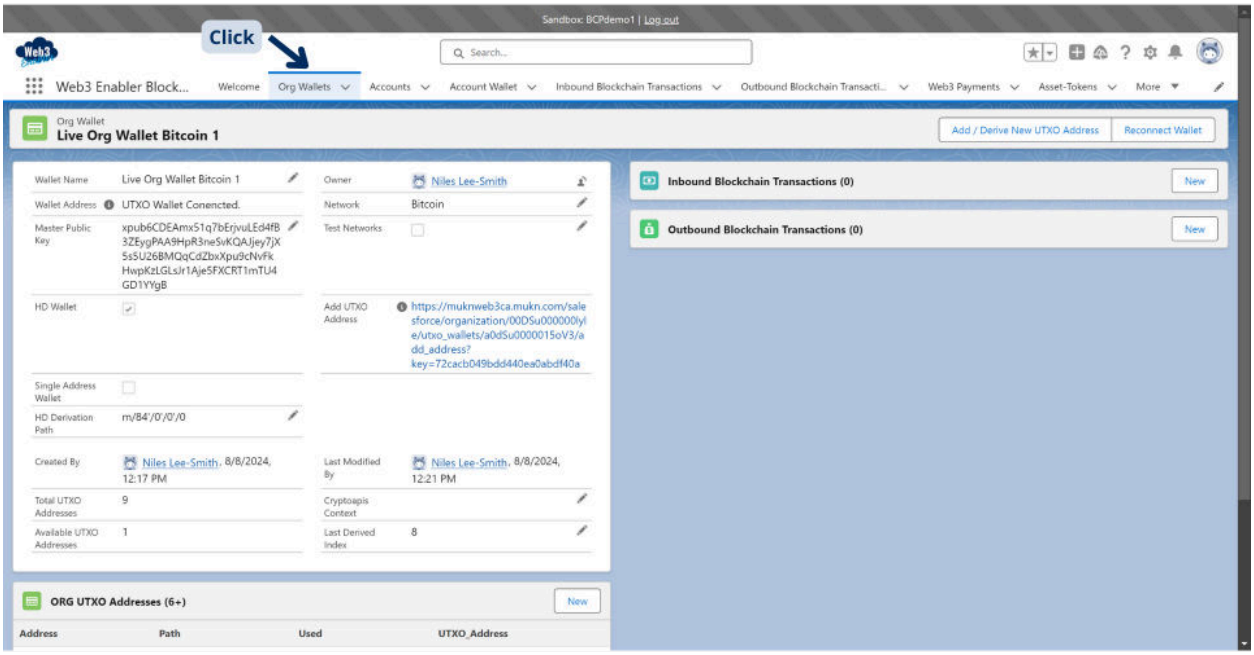


5. Select Network, Select Wallet, enter xpub Wallet Address, and click Connect.



6. View a successful connection and go to Org Wallets.

7. View Org Wallet UTXO details and click Org Wallets.

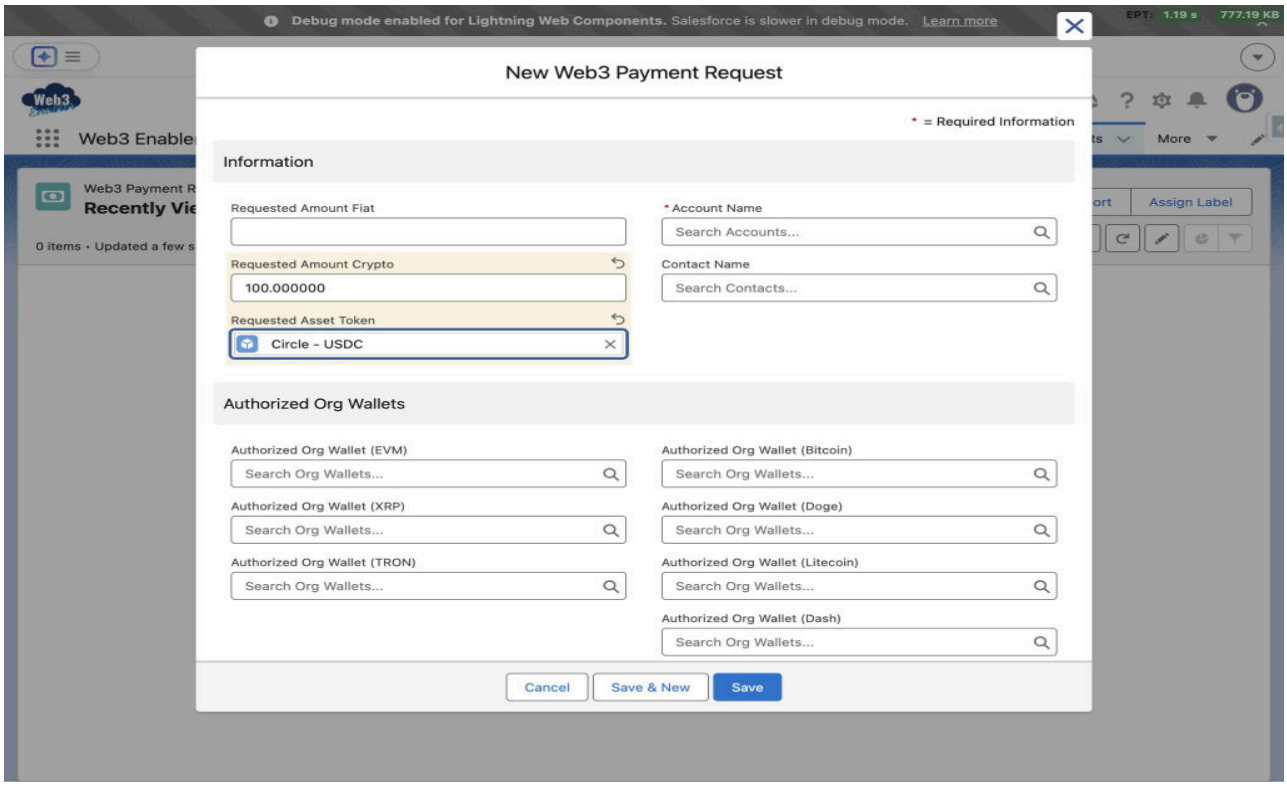


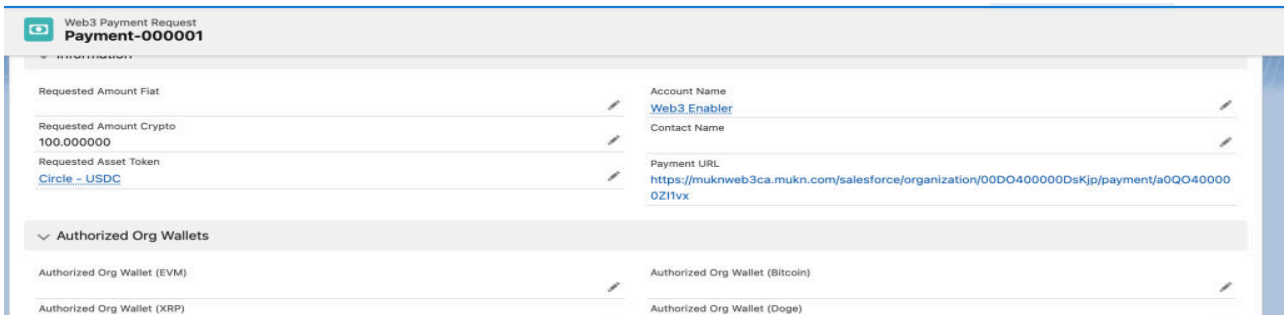
Section 2: Creating Payment Requests (Inbound)

2.1 Creating a Payment Request

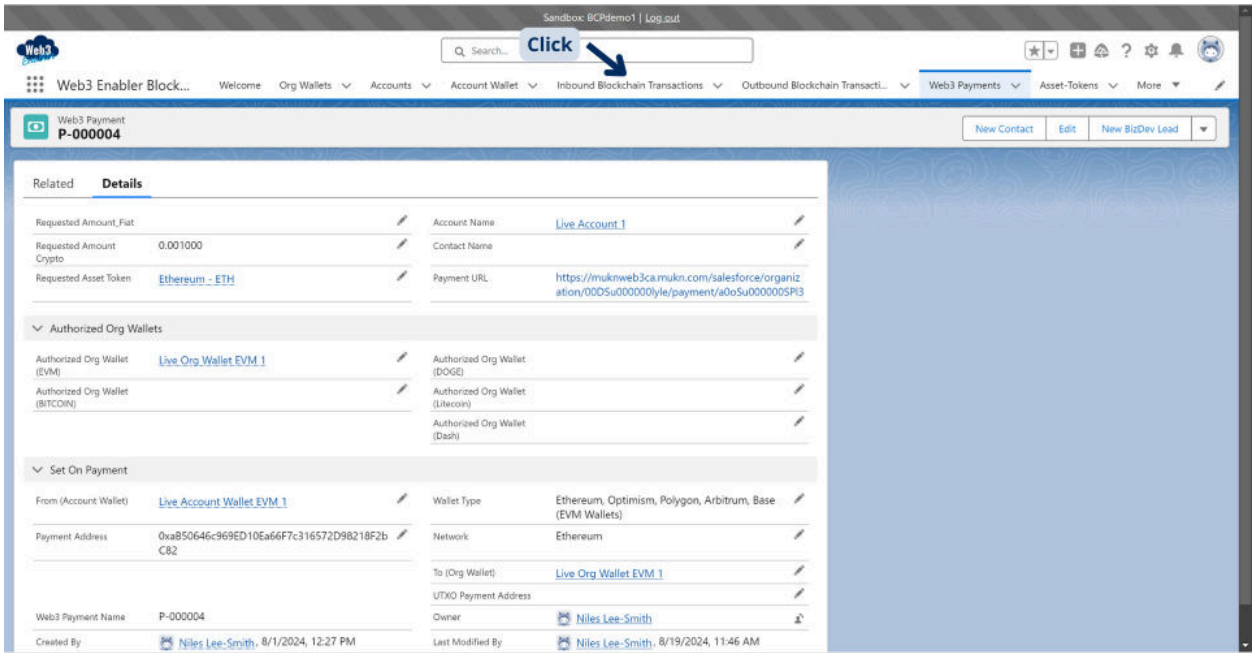
Purpose: Generate a payment request for a customer to pay you to your company wallet. Steps:

1. Navigate to Web3 Payment tab
2. Click New button
3. Fill in required fields:
    - Account: Select the customer's Salesforce Account
    - Account Wallet: Select or create customer's wallet
    - Org Wallet: Select your organization's wallet to receive payment
    - Requested Amount (Fiat): Enter amount in USD/EUR/etc.
    - Requested Amount (Crypto): The value of the cryptocurrency requested
    - Payment Asset Token: Select cryptocurrency (Bitcoin, Ethereum, USDC, etc.)
4. Click Save

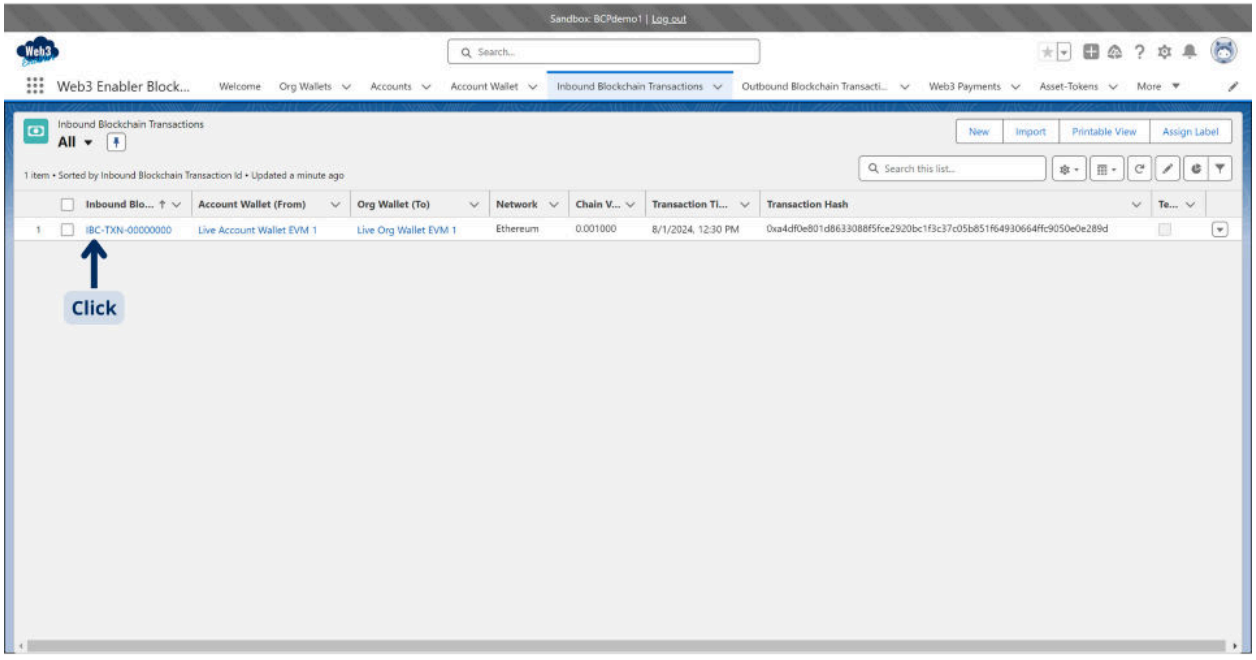




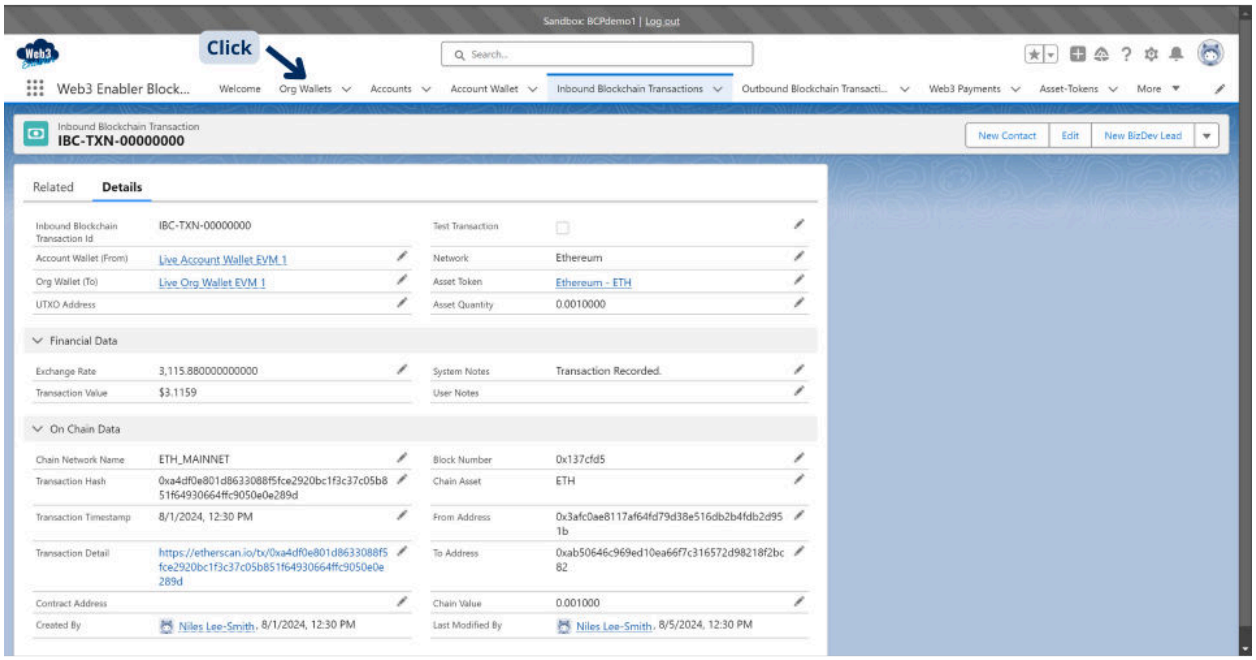
1. View the new Web3 Payment details and Click Inbound Blockchain Transactions.



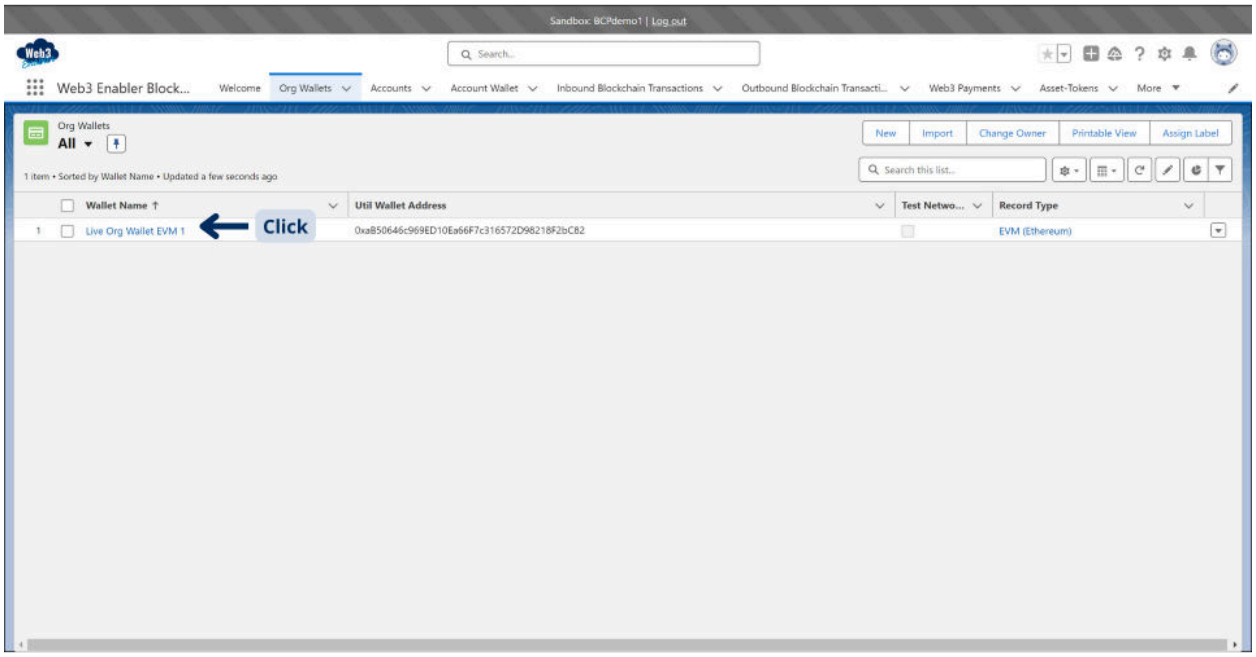
2. Click the new Inbound Blockchain Transaction.



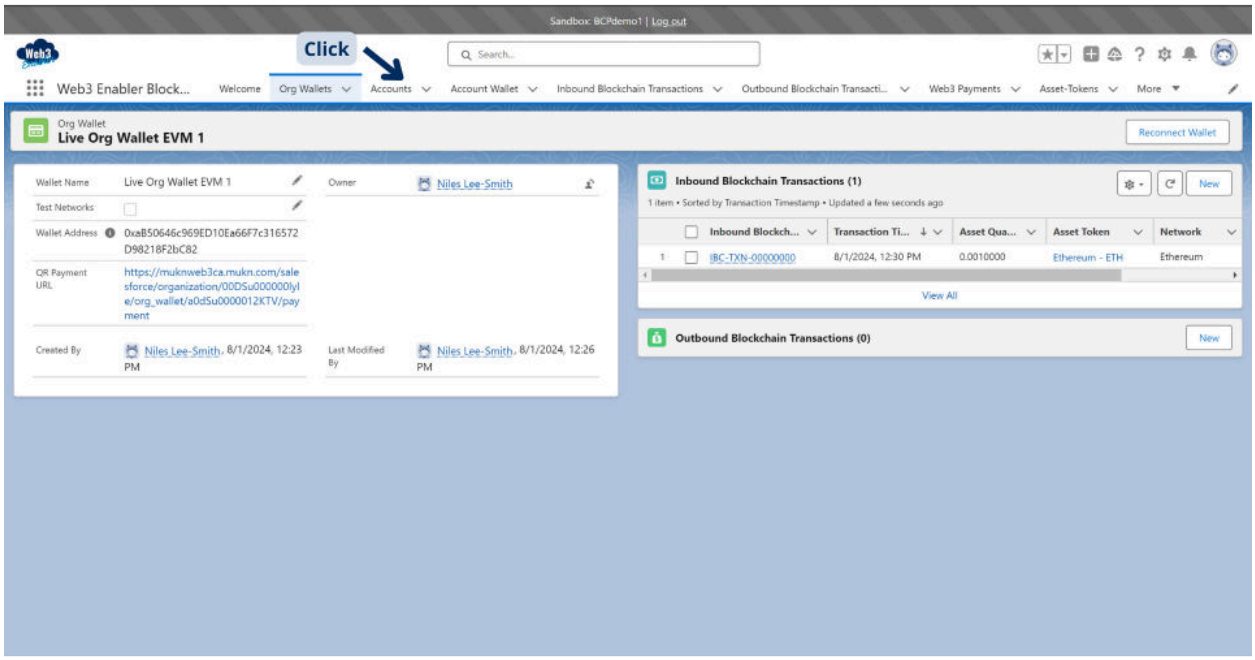
3. View the new Inbound Blockchain Transaction and click Org Wallets.



4. Click the Org Wallet EVM.



5. View the new Inbound Blockchain Transaction and click Accounts.



6. Once an Inbound Transaction for the Amount Requested in the Payment request is sent to the Org Wallet Address, then the Payment Request is marked as paid if the transaction satisfies the invoice.

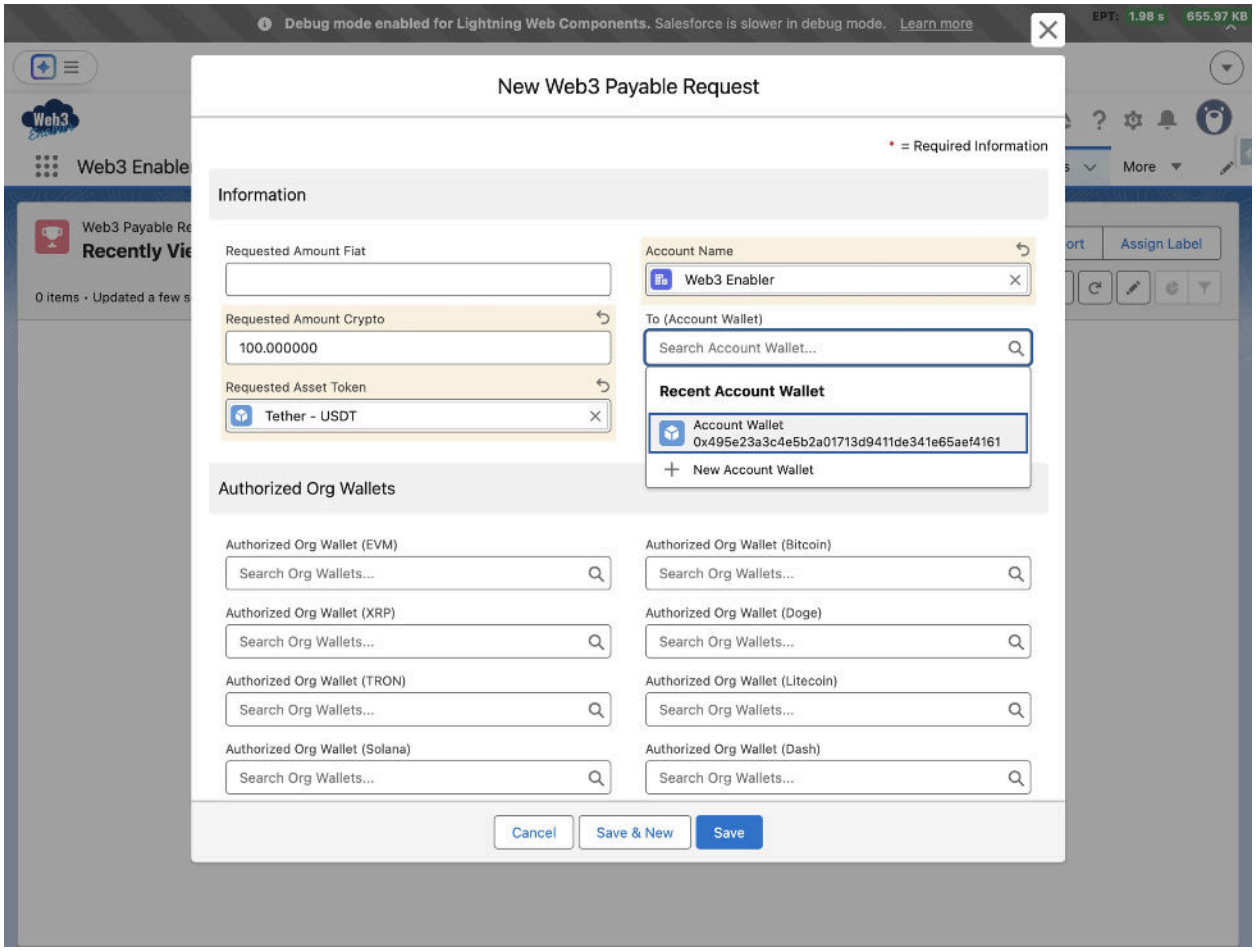
Section 3: Creating Payable Requests (Outbound)

3.1 Creating a Payable Request

Purpose: Generate an outgoing payment request to pay a vendor or customer in cryptocurrency.Steps:

1. Navigate to Payable tab
2. Click New button
3. Fill in required fields:
   - Account: Select the vendor's Salesforce Account
   - Account Wallet: Select vendor's wallet address
   - Org Wallet: Select your organization's wallet to send from

- Amount (Fiat): Enter amount in USD/EUR/etc.
- Amount (Crypto): The amount of the crypto currency to send to the vendor.
- Requested Asset Token: The Asset token the Org is expecting to pay the vendor Account Wallet.



4. The created Outbound Payable Request will get marked as paid when the Account Wallet received the successful transaction that fufills the Web3 Payable in real time on the Blockchain.

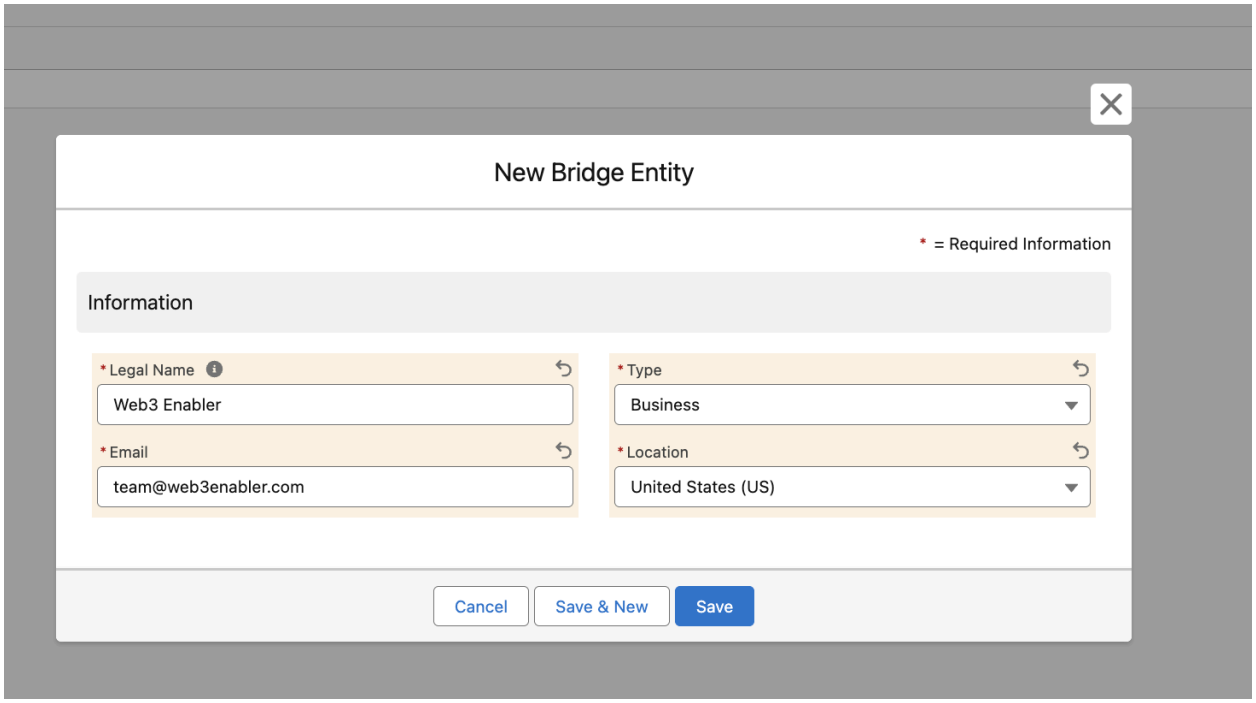
Section 5: Bridge Liquidation Wallets

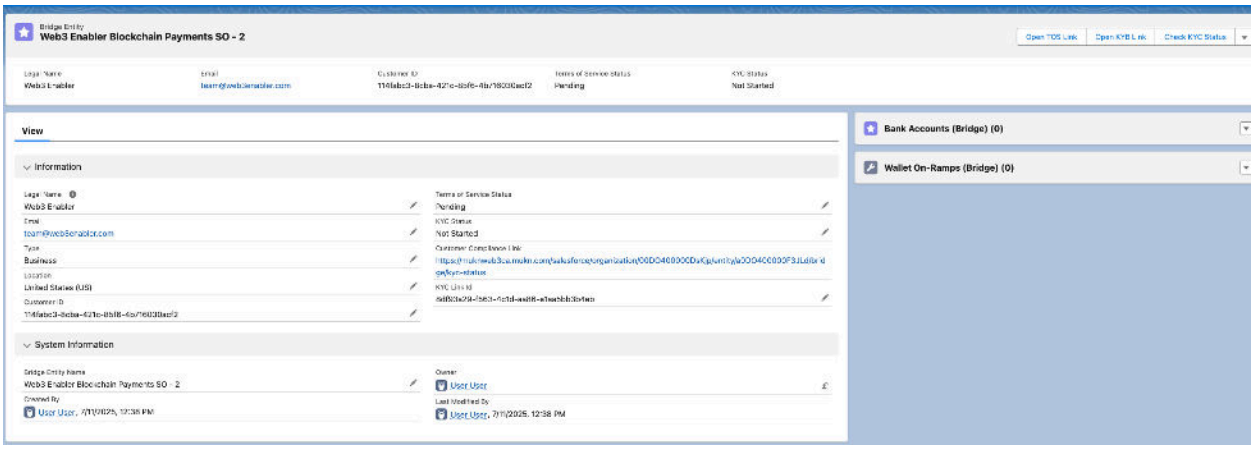
5.1 Creating Bridge Entity

Purpose: Set up a customer entity for Bridge API integration to enable easy crypto to Fiat Offramops.

Steps:

1. Navigate to Bridge Entity tab
2. Click New button
3. Fill in required fields:
    - Bridge Entity Name: Customer entity name
    - Account: Link to Salesforce Account
    - Entity Type: Individual or Business
    - Country: Customer's country of residence
4. Click Save





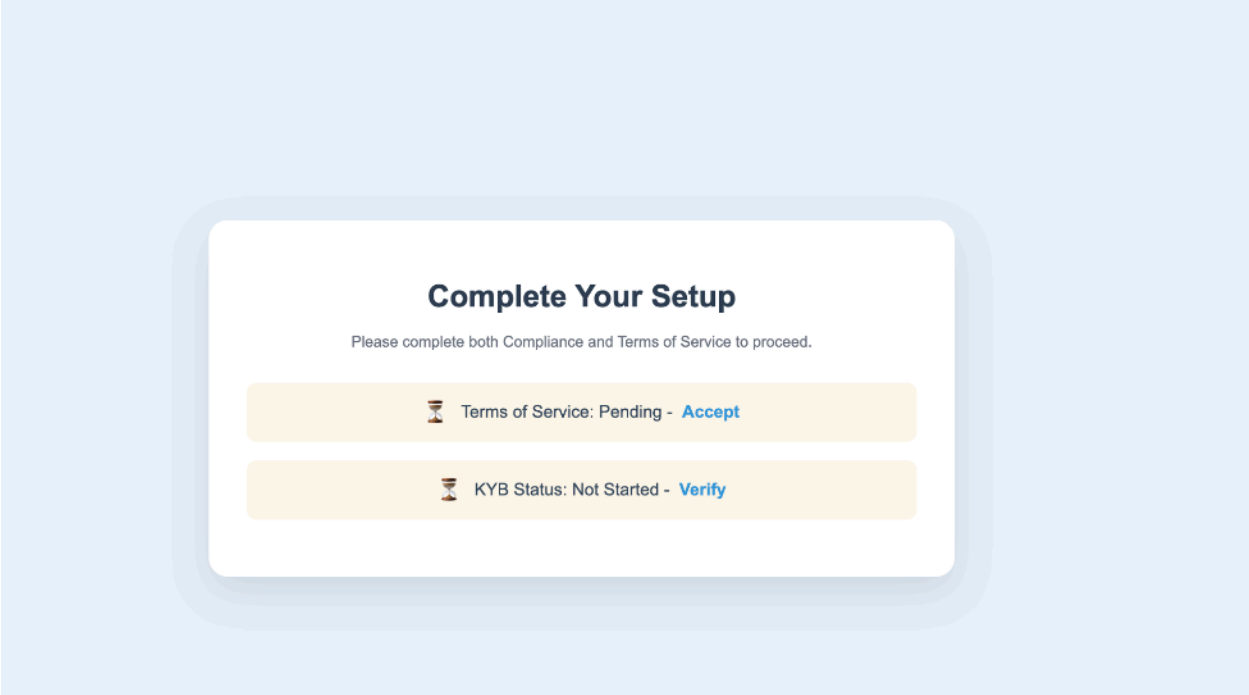
5.2 KYC/KYB Process

Steps:

1. Open Bridge Entity record
2. Click Customer Compliance Link
3. System redirects to Bridge KYC portal
4. Customer completes identity verification:
    - Individual: ID verification, proof of address
    - Business: Business registration, ownership verification
5. Monitor KYC status updates

KYC Status Options:

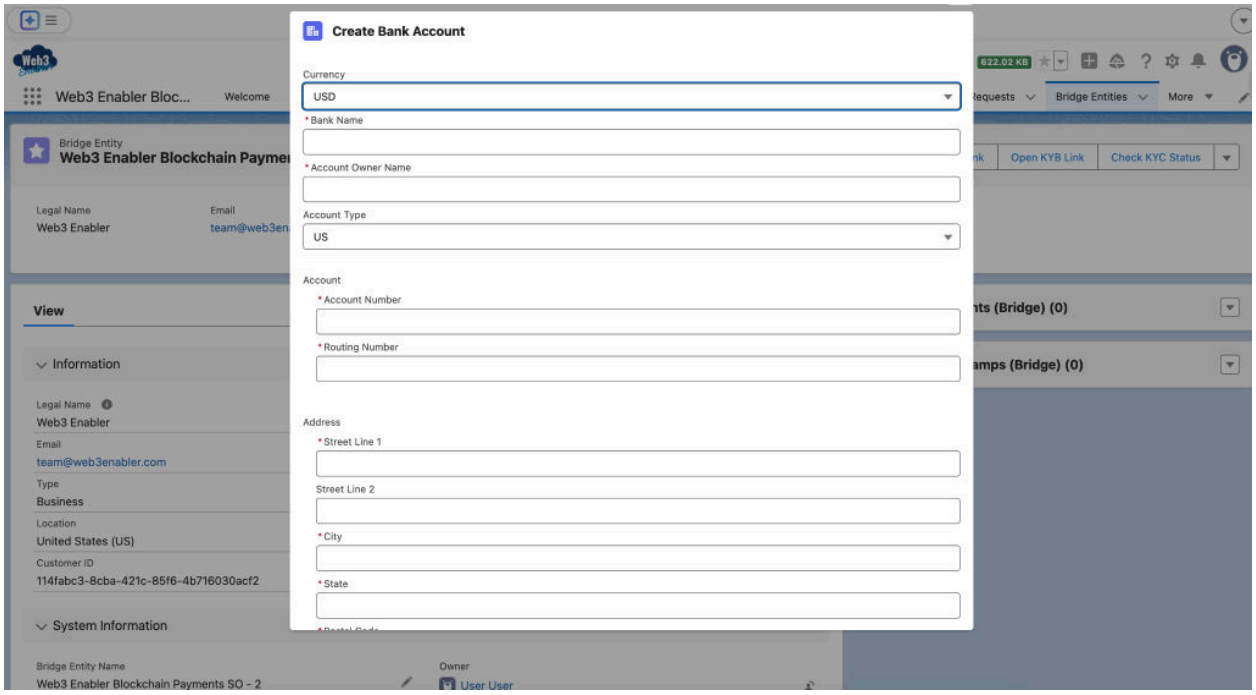
- Pending: Verification in progress
- Approved: KYC completed successfully
- Rejected: Verification failed, requires resubmission
- Under Review: Additional documentation needed



5.3 Creating External Bank Account

Purpose: Connect customer's bank account for fiat off-ramping services.Steps:

1. Navigate to Bridge External Account tab
1. Click New button
1. Fill in required fields:
    - Bridge Entity: Select verified Bridge Entity
    - Account Type: Checking or Savings
    - Bank Country: US, EU, or other supported region
    - Account Details: Bank routing and account numbers
1. Click Save

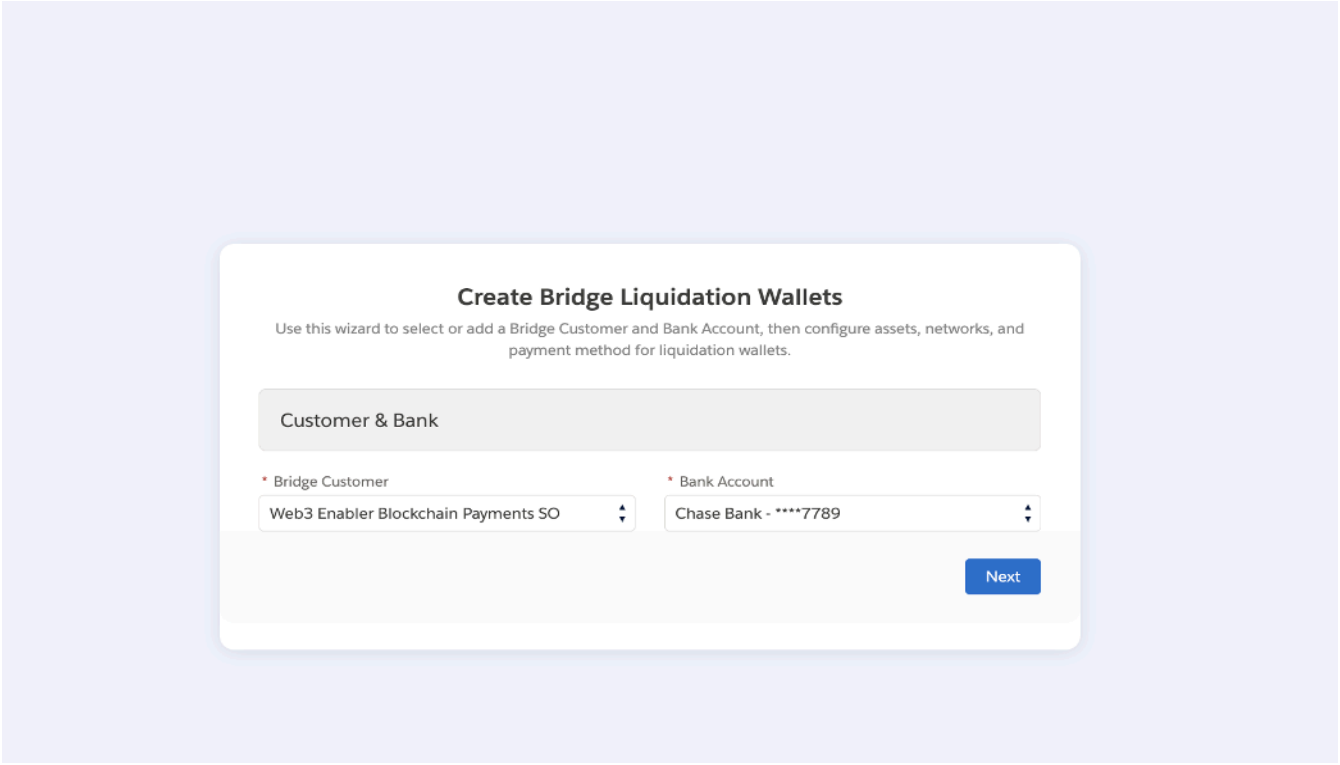


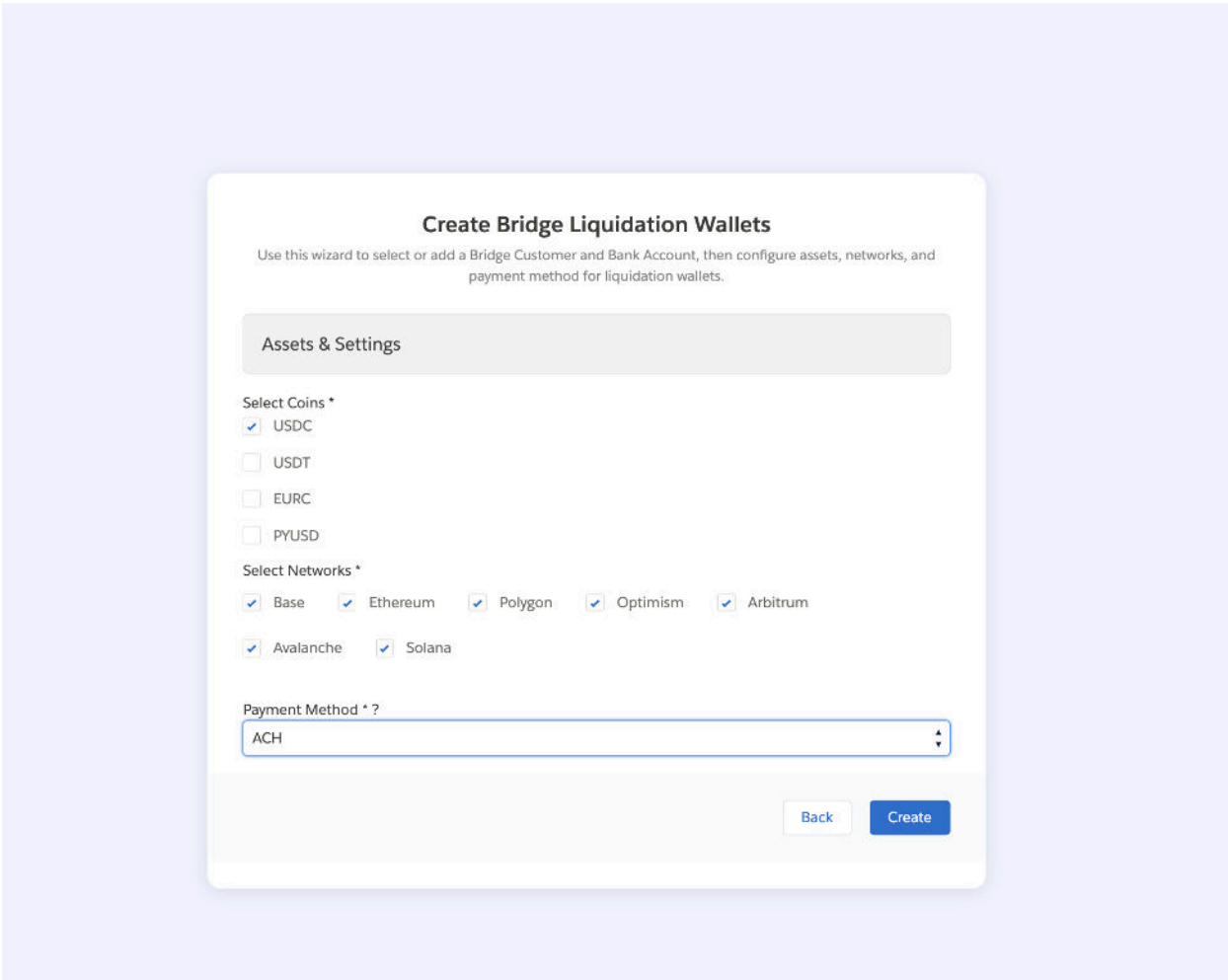
Section 6: Liquidation Wallets

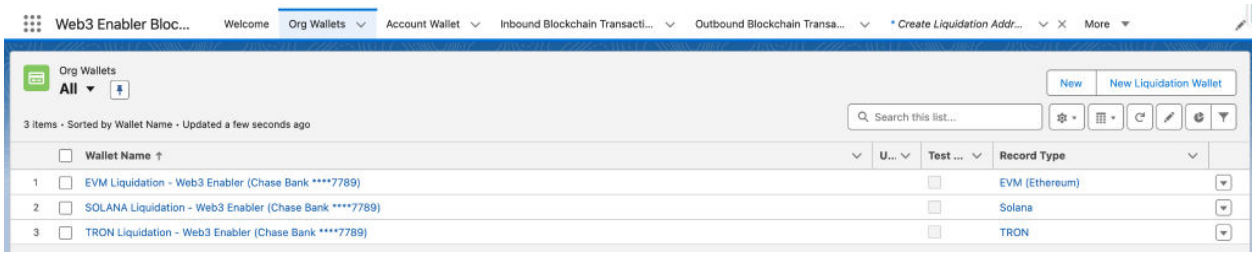
6.1 Creating Liquidation Address

Purpose: Set up addresses for converting cryptocurrency to fiat currency.Steps:

1. Navigate to Org Wallets tab
2. Click New Liquidation Wallet
3. On the page select your verified Bridge Entity and Bank Account
4. Follow the flow and select the Networks and Cryptocurrency combinations that you would like to create offramps for to your bank account.
5. Navigate back to Org Wallets tab to see the newly created Liquidation Wallets for each type.


Create Bridge Liquidation Wallets
Use this wizard to select or add a Bridge Customer and Bank Account, then configure assets, networks, and payment method for liquidation wallets.
Customer & Bank
* Bridge Customer
Web3 Enabler Blockchain Payments SO
* Bank Account
Chase Bank - ****7789
Next


Create Bridge Liquidation Wallets
Use this wizard to select or add a Bridge Customer and Bank Account, then configure assets, networks, and payment method for liquidation wallets.
Assets & Settings
Select Coins *
USDC
USDT
EURC
PYUSD
Select Networks *
Base
Ethereum
Polygon
Optimism
Arbitrum
Avalanche
Solana
Payment Method * ?
ACH
Back
Create



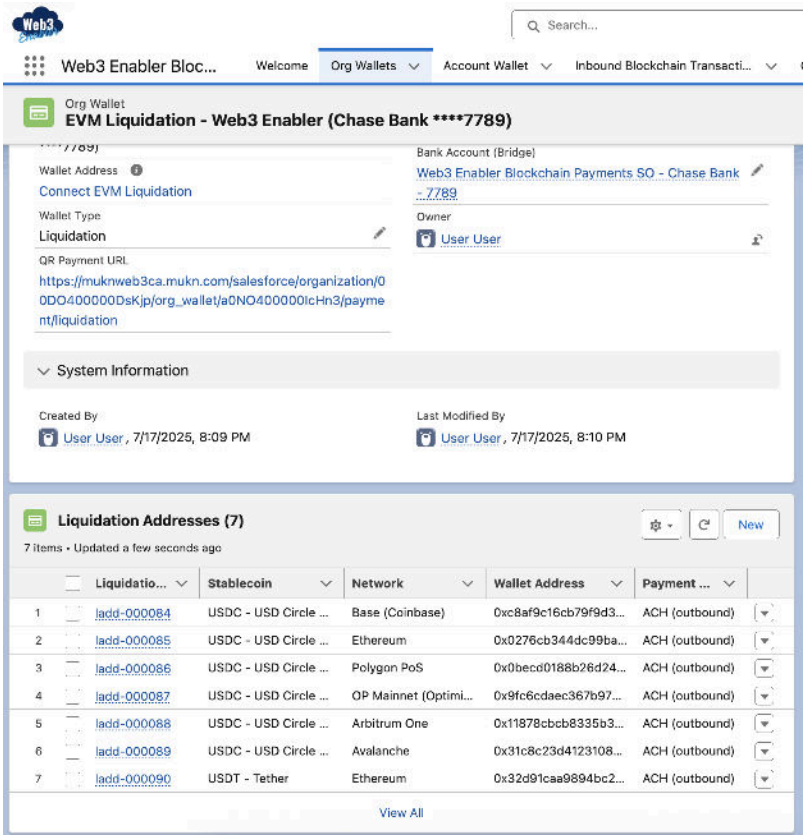
6.2 Viewing Liquidation Addresses

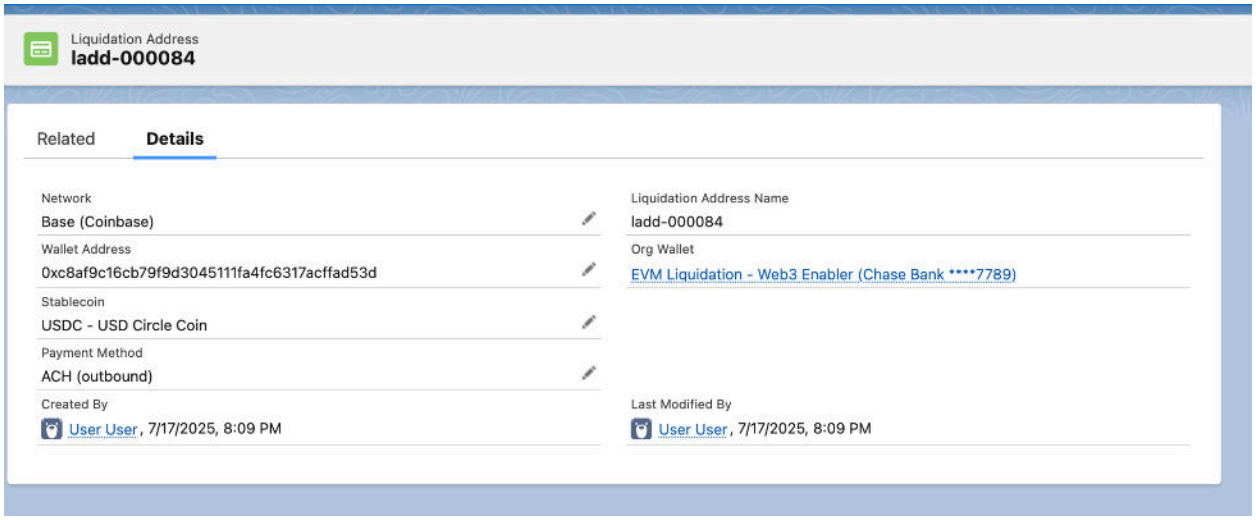
Steps:

1. Customer sends cryptocurrency to liquidation address
2. Bridge system detects incoming transaction
3. System converts crypto to fiat at current rates
4. Initiates ACH/wire transfer to customer's bank account
5. Customer receives fiat payment in 1-3 business days

What Happens:

- Inbound Blockchain Transaction records the crypto receipt
- Bridge system processes conversion
- Customer receives confirmation of transactions on the Blockchain.





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.