User Guide

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MTC
THE CRM SERVICES VALUE SOURCE

Credit Card Processing

MTC THE CRM SERVICES VALUE SOURCE

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Product Overview

In association with Authorize.net the process of capturing Credit Card Details with high security made possible in Microsoft Dynamics CRM. Processing credit card transactions made easier and quicker. The credit card details stored in CRM are encrypted to avoid any misuse of data. The merchants can fulfill and complete the process of Sales Cycle with ease. This product also supports to make refunds to Accounts or Contacts if the Payments are received.

- Store customer credit card information securely within CRM field level security. Or for greater compliance to Visa card regulations and best practice standards, keep customer credit card information out of your company, remove liability and responsibility, but maintain accessibility to your customer order funding credit card information your selling transaction processes via the optional Authorize.Net Customer Information Manager (CIM) service.

- CIM allows Authorize.Net to securely store your customer's critical credit card information in their cloud without your CRM, or your company actually ever having it.

- Access CIM customer secure data from CRM automatically, seamlessly, again securely as needed anytime, even repetitive monthly transactions.

- Processing credit card payment made easy, simple for Microsoft Dynamics CRM. The credit card details store in CRM are encrypted to avoid any misuse of data. The merchants can fulfill the process of Sales at ease. Merchants also make Refund of payments either from Account or from Contact in CRM.

- AVS or Address Verification Service used by banks and associated credit card processors to reduce risk of fraud and offers a lower processing rate.

- The service is available widely in North America and Europe, and larger banks globally. AVS is a toggle either enabled or disabled, prior to transactions where address information is required in the transaction.

- Set recurring bill cycle and charge your customers accordingly with least time and effort involved.

- This is important to most organizations that take high value or high volume credit card transactions because if AVS is Used a lower transaction percentage fee is applied to each applicable transaction.

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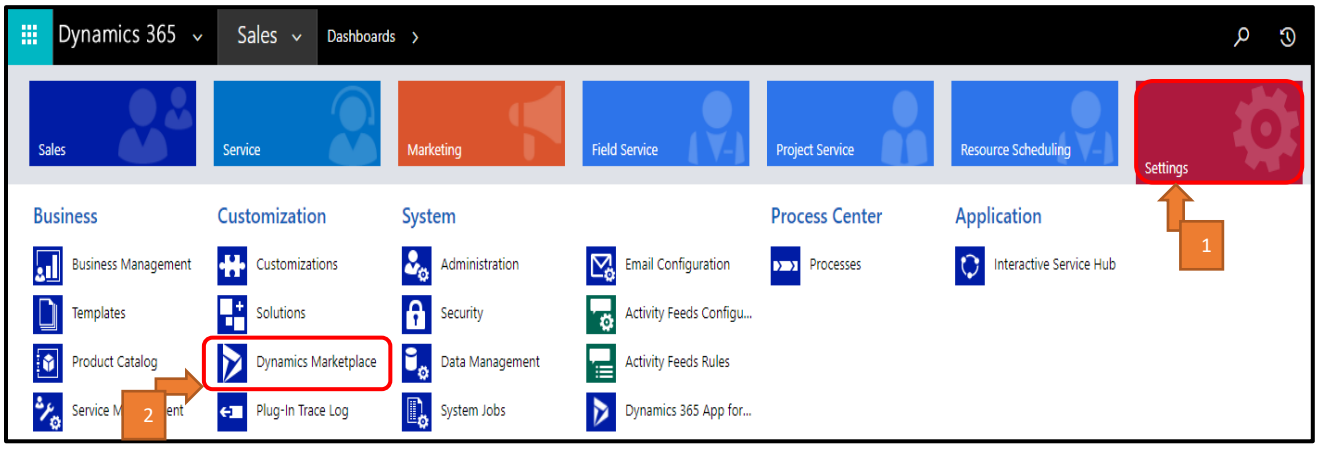
How to Install Credit Card Processing?

To **Install** MTC's Credit Card Processing Add-on solution into your Dynamics 365, please follow the below instructions.

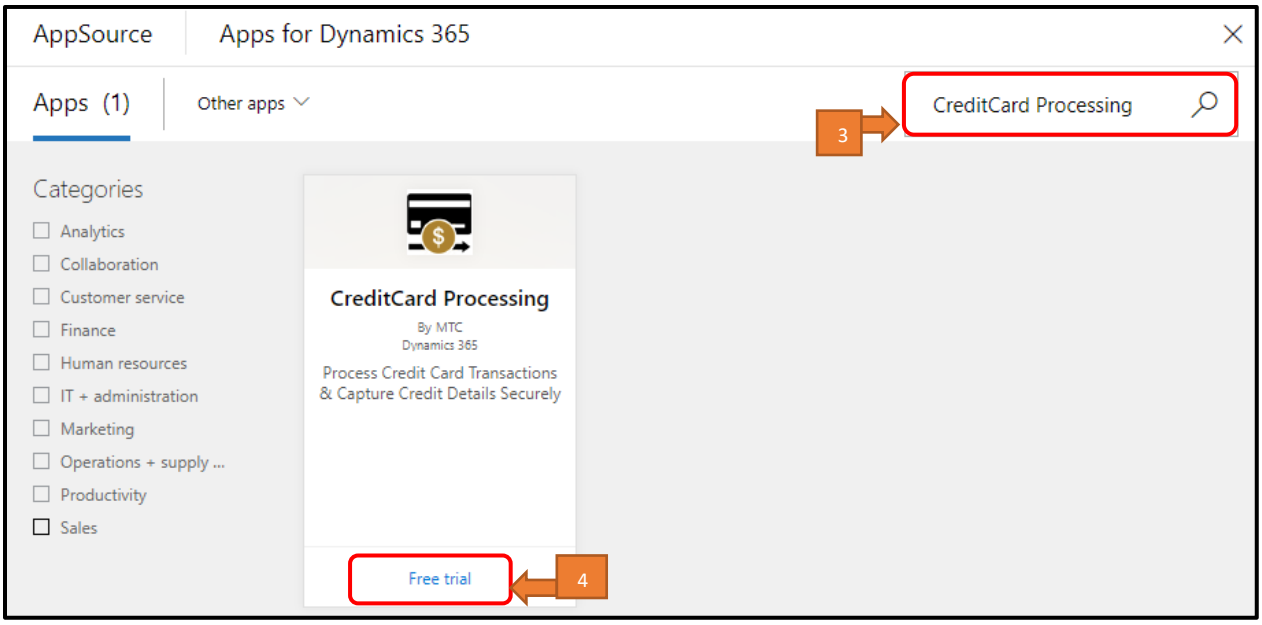
Step1:

- Navigate to **Dynamic 365 -> Settings** and click on **Dynamics Marketplace**.



Step2:

- In search box search for **Credit Card Processing by MTC** and click on **free trial**.



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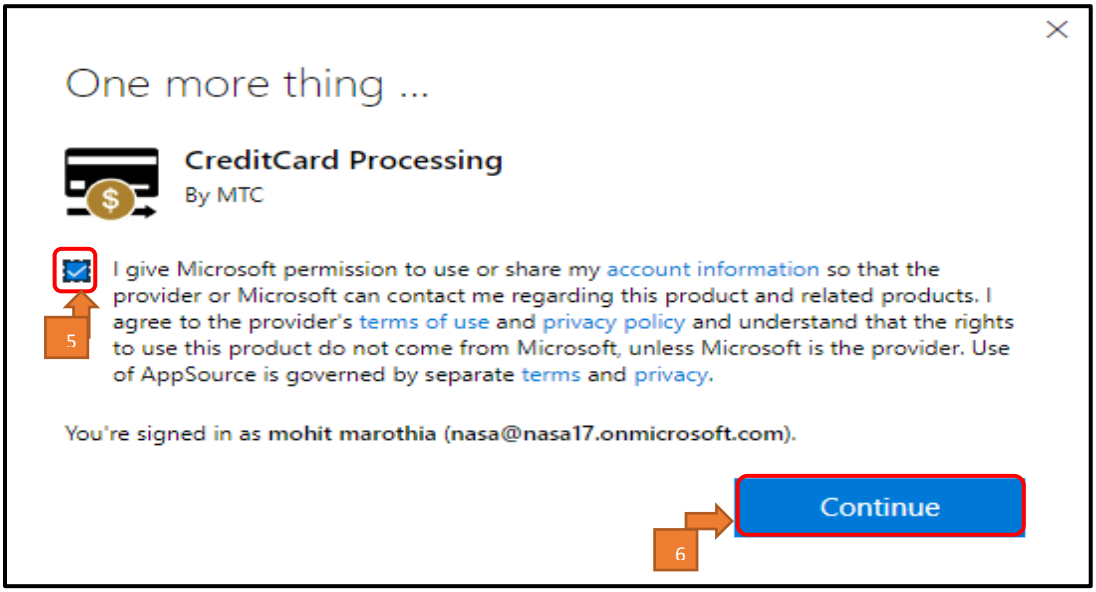
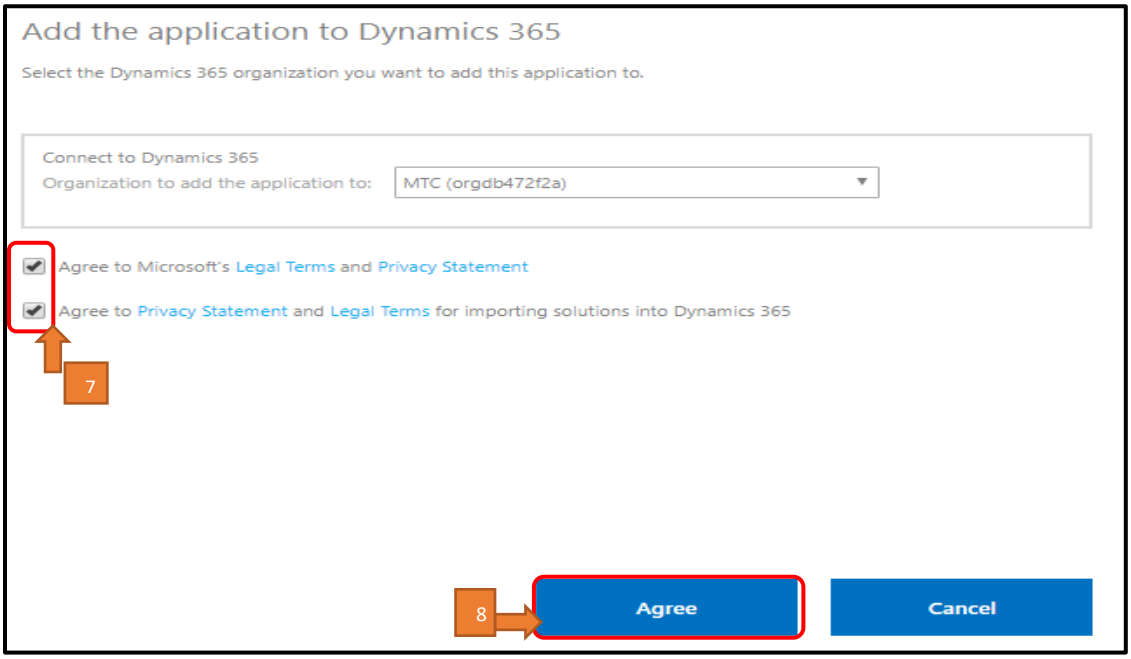
Step3:

- Please check on the **Check Box** to give permissions and click on **Continue.**



Step4:

- Please check the two check boxes to agree **Microsoft Legal Terms and conditions** and agree to **Privacy Statement and Legal Terms** and click on **Agree** for importing the solution.



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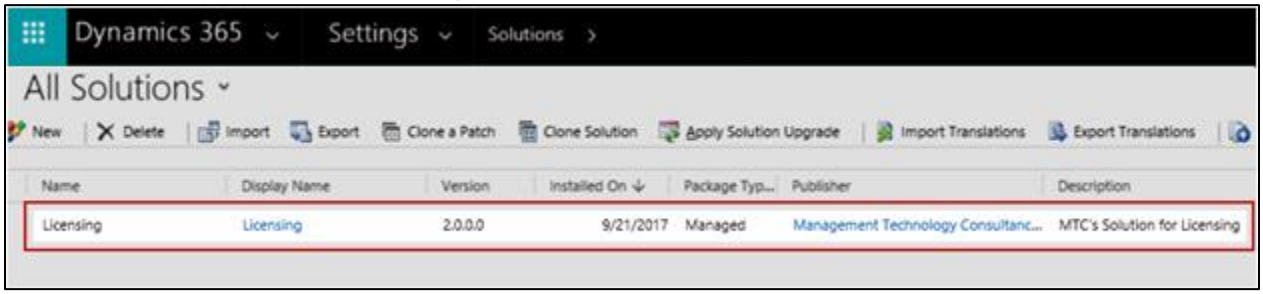
Step5:

- After clicking on agree the **Installation Process Begins**.

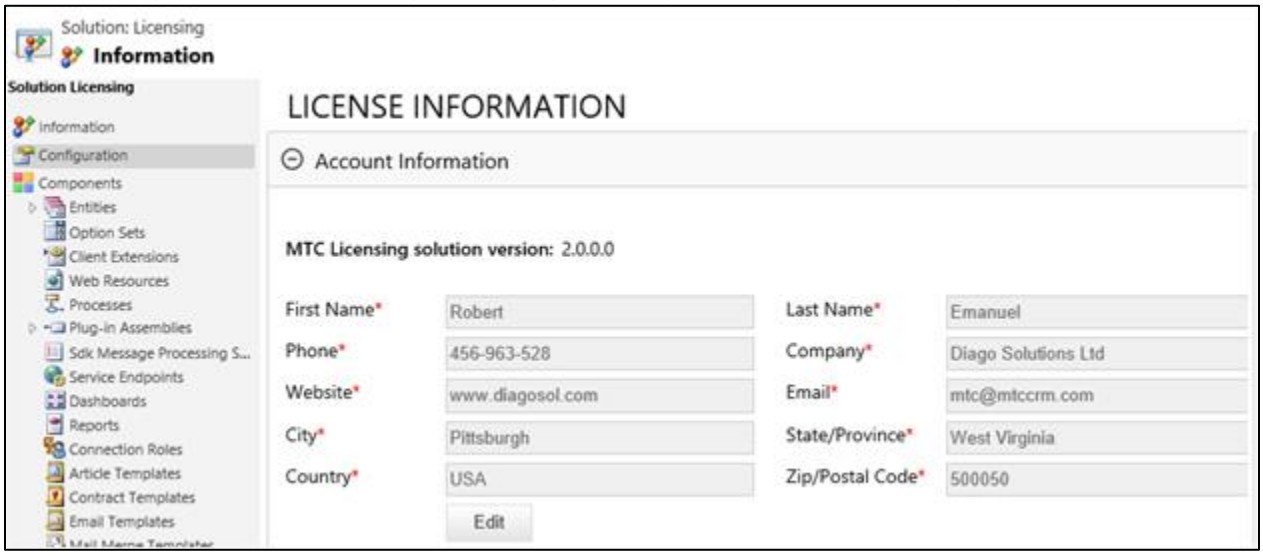
MTC Credit Card Processing	2016.122016.2.0	1/1/2050	Installation pending
Office 365 Groups	2.7.0.0	1/1/2050	Not installed
Project Service Automation	1.2.1.56	1/1/2050	Not installed

Step6:

- After the installation is complete, the status changes to Installed.
- Go to **CRM → Settings → Solutions**. This CRM access and these steps require the Administrator Security Role. Click on **licensing solution** for the Account Registration window.



- Complete the field details (Refer example below). All fields are mandatory. Click Submit.



- The Account Registration window refreshes automatically and loads up with more section details such as such as Activated Bundle Products, Activated Products and Download More Products.

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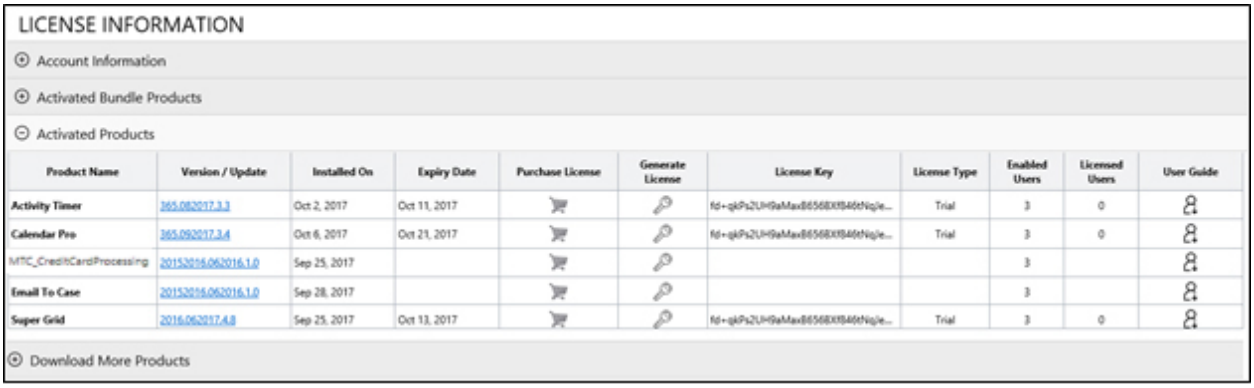
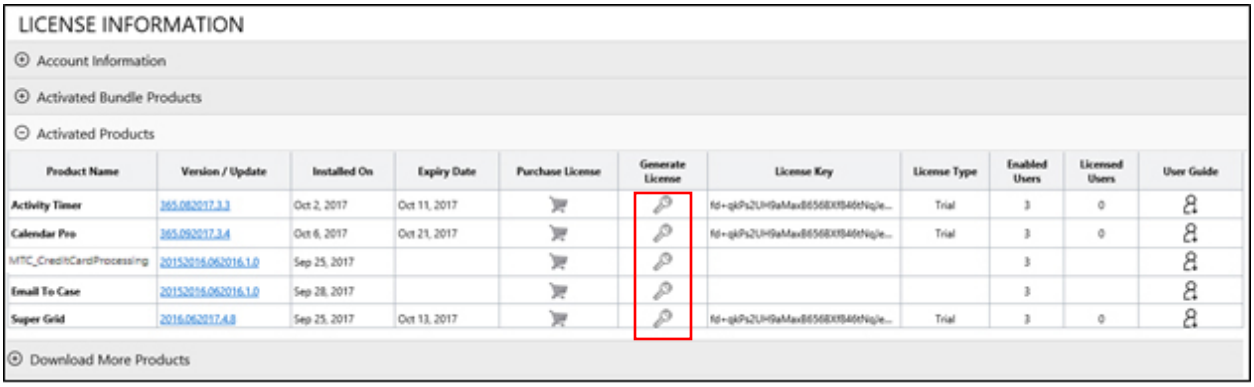


- All MTC products downloaded are shown in “Activated Products” or “Activated Bundled Products.”
- You can see MTC’s Customer Survey installed date and expiry date along with purchasing options.

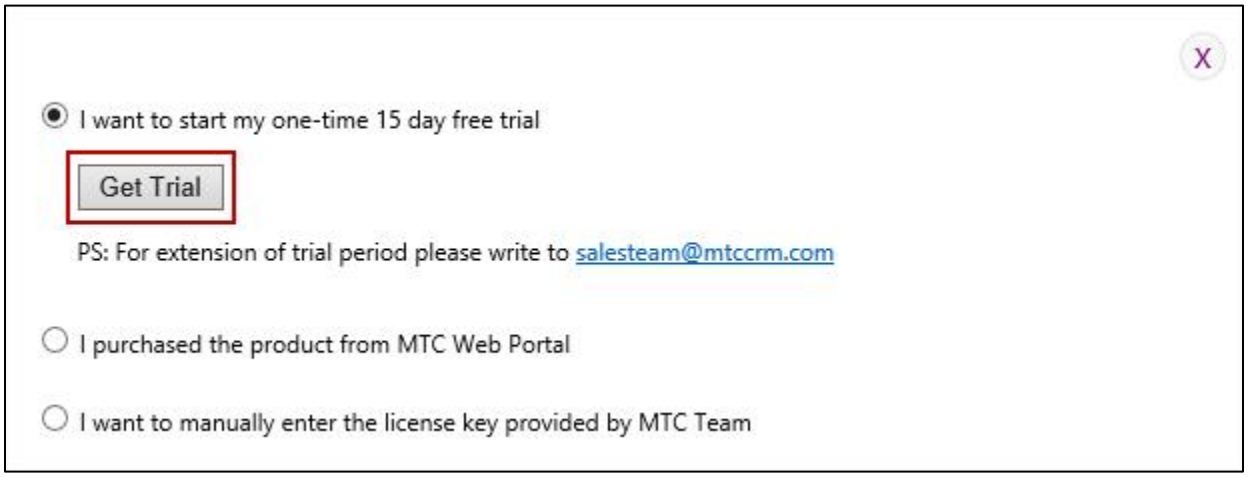
Generating Free Trial

- There are 2 ways to generate 15 day free trial license key for MTC’s Credit Card Processing:

a. Click on Key Icon under Generate License of Activated Products for MTC’s Credit Card Processing.



You will see a window with 3 options. Select “I want to start my one-time 15 day free trial” and click "Get Trial." Your 15 day free trial will be generated and updated in the Activated Products tab.



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b. Alternatively, the 15 day free trial license key will be generated by the first use of the product, allowing delay or an alternate User to start the trial with the appropriate Product's Security Role. The free trial license key will be generated and updated in the Activated Products tab.

- To purchase this product, click on "cart icon" under purchase license and follow the series of steps as guided by the system. For any queries, write down to Salesteam@mtccrm.com

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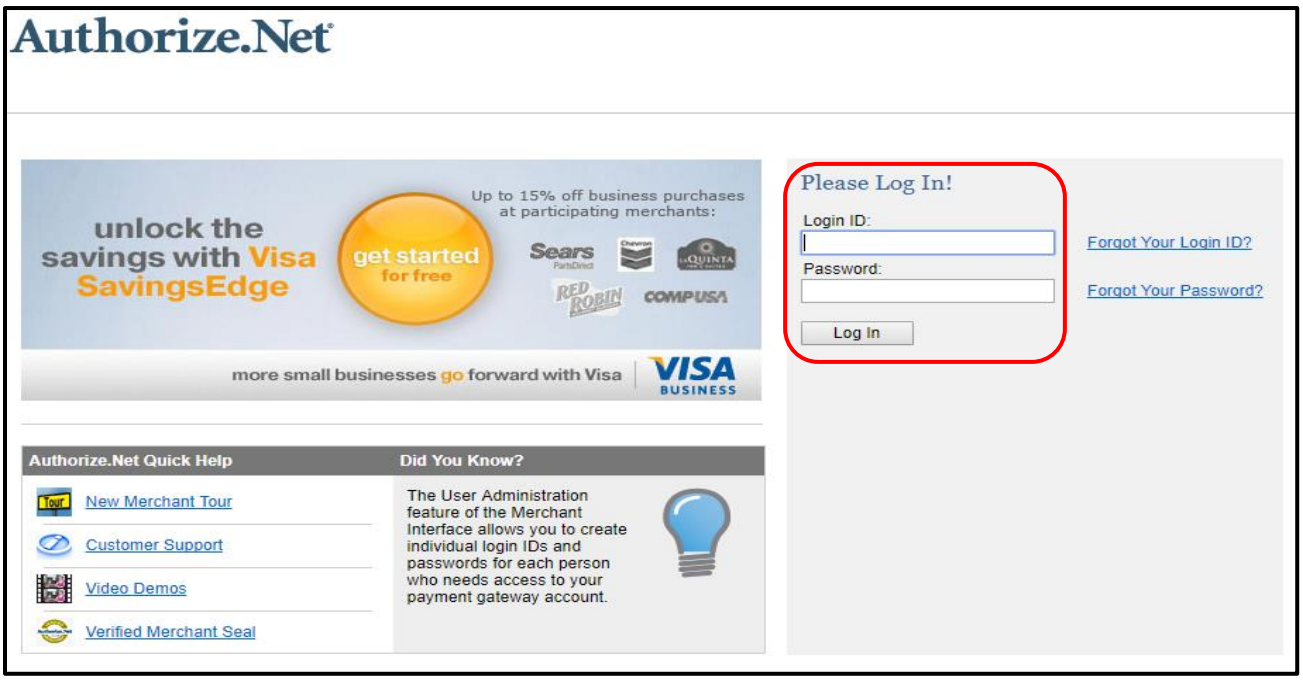
Configuration of Credit Card Processing

Step1:

Register with Authorise.net

Step1:

- The user has to resister with Authorize.net a gateway solution. First get **API Login code** and **API Transaction Key**. Unless these codes are obtained from Authorize.net the user cannot process the credit card processing solution.
- Login to https://account.authorize.net/



Step2:

- If you want to change API Login Key or API Transaction Key, click on **ACCOUNT**.
- Click on **API Credentials & keys** to change the API Login Key and API Transaction Key.

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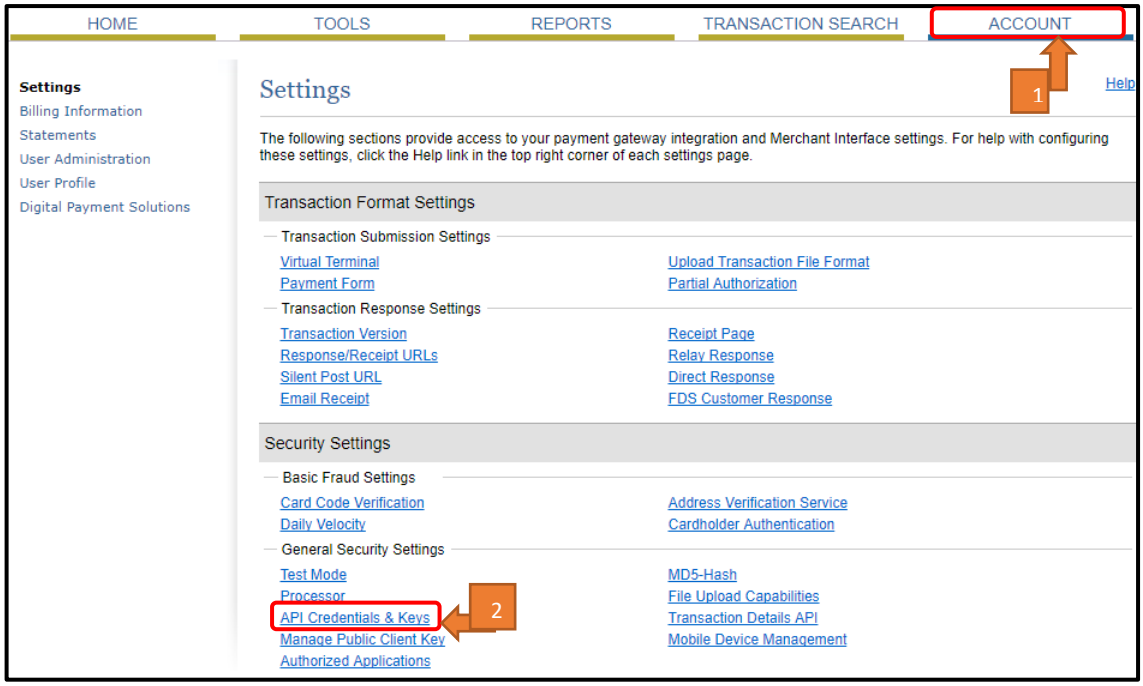

Step3:

- API login ID is shown against its column along with the other details like Login ID last Obtained and Transaction Key last obtained.
- Fill up your **Secret Answer** which has been auto generated when u signed up in Authorized.net
- Click on **Submit**.

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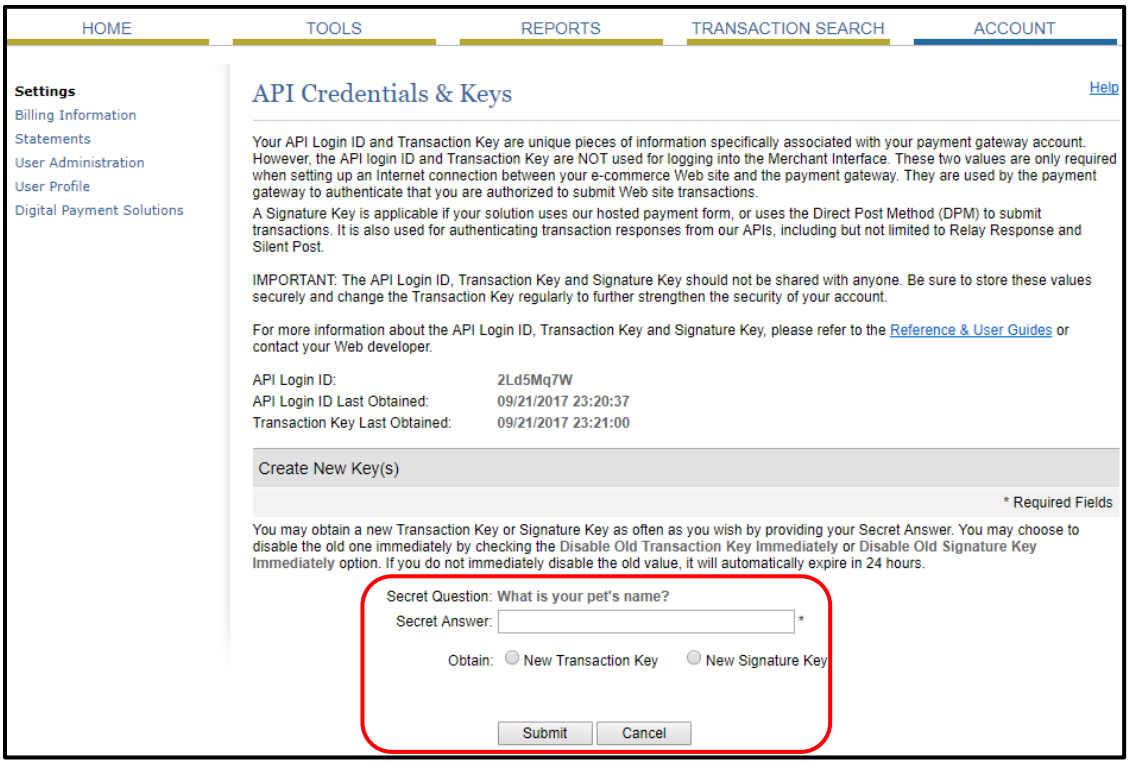
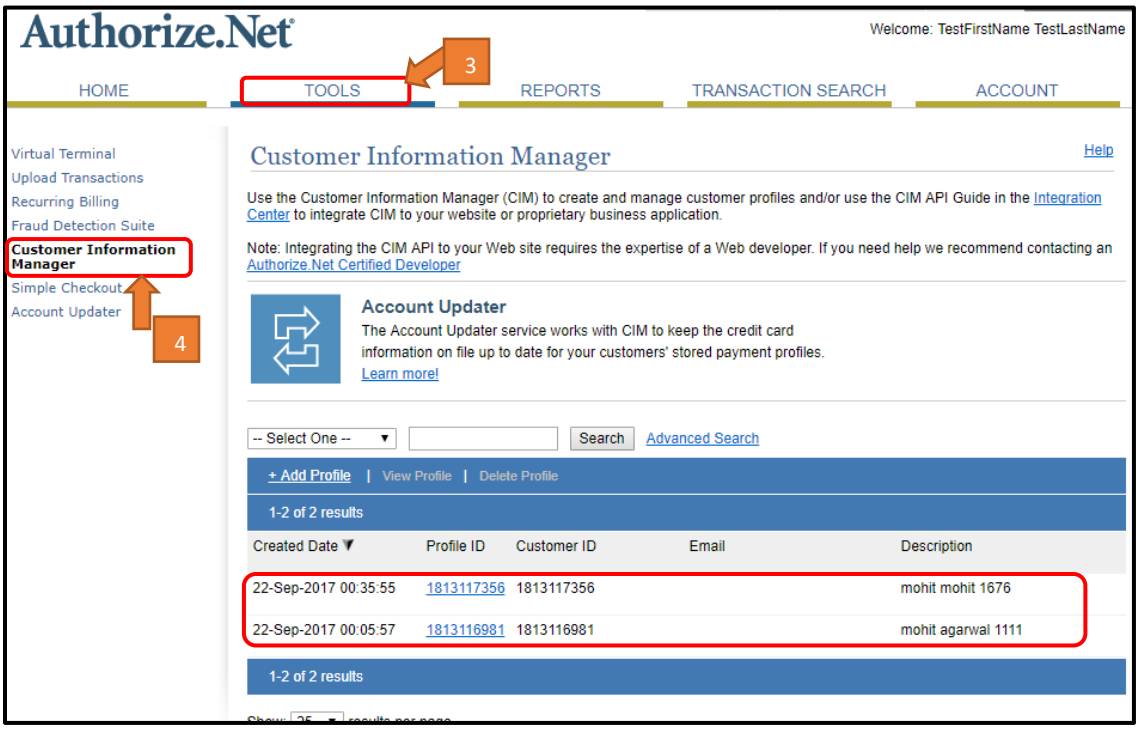


Step4:

- Navigate to TOOLS →Customer Information Manager, to see all the transactions made by the credit card.



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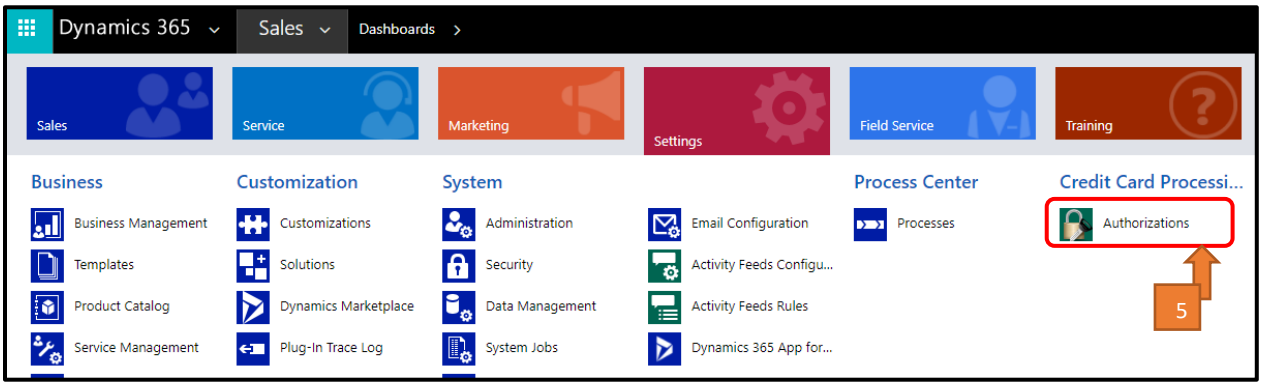
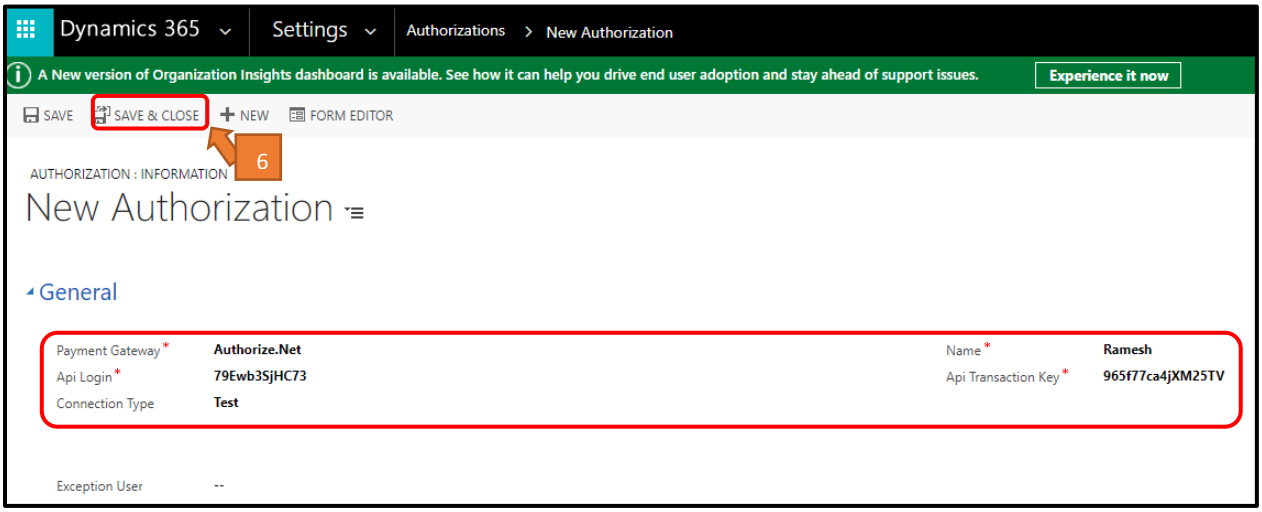
Step5:

- Store and Record API Login ID and Transaction Key details.
- Navigate to Dynamics365->Settings->Credit Card Processing->Authorizations.



Step6:

- Fill up the required details along with Api Login Key and Api Transaction key.
- Click on SAVE & CLOSE.



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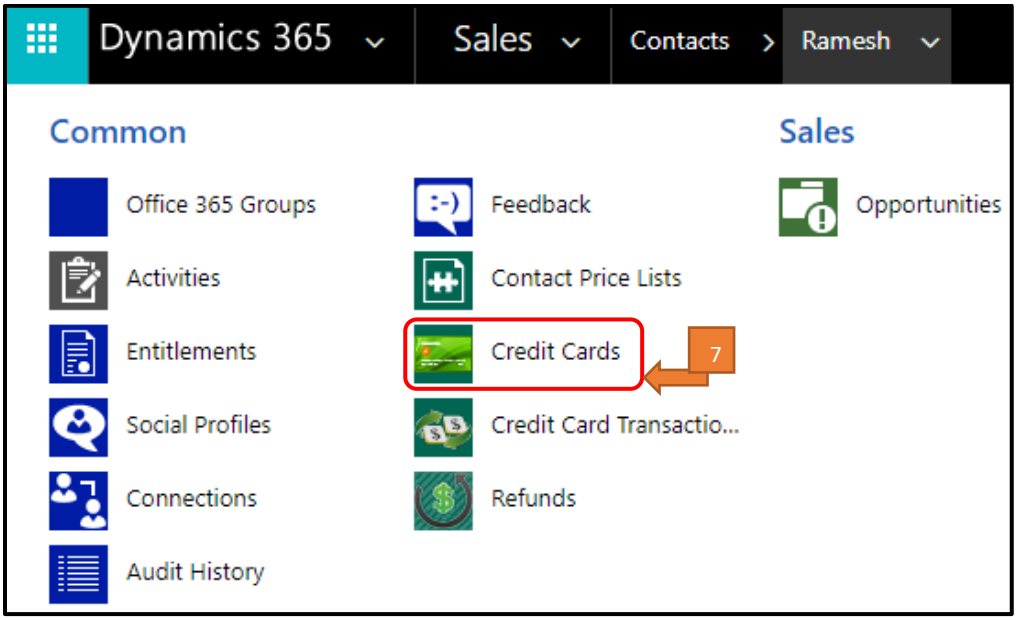
There are three ways to do a Transaction using Credit Card Processing:

- Contact Level Payment
- Account Level Payment
- Invoice Level Payment

Procedure to add Credit Card to customer.

Step7:

- For example, let's find out how Credit Card Processing work **on "Contact Level."**
- Create a new **Contact** and from the navigation panel click on **Credit Card**.



Step8:

- Click on **ADD NEW CREDIT CARD**.

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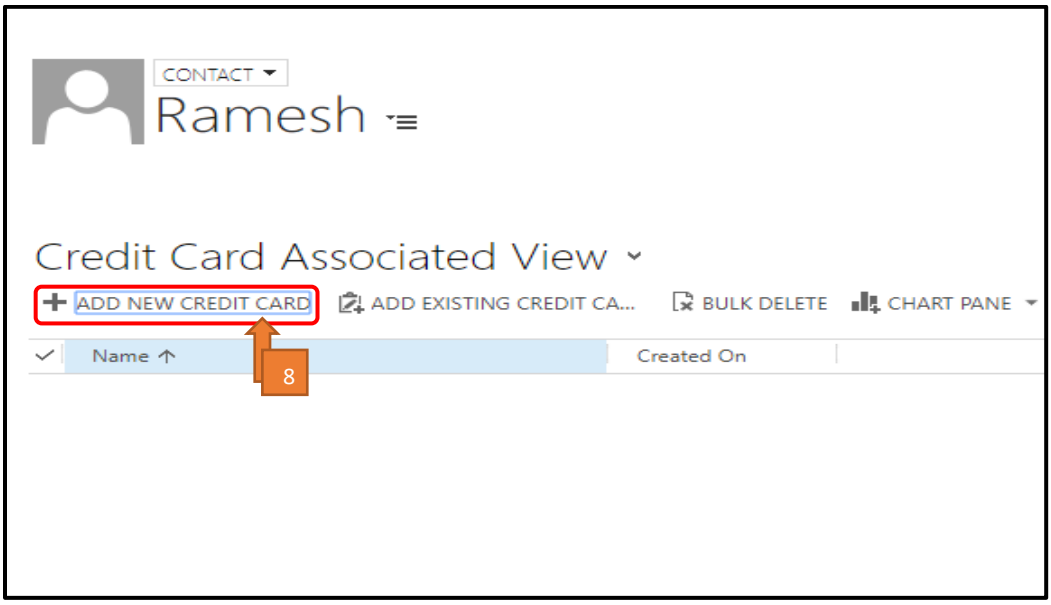

Step9:

- A new window will appear to add new credit card details.
- Fill up the required Credit Card details, such as:
- Enter all fields like Expiry Month, Year, Card Number, type of card, Billing Address information.
- Select Authorization with the help of look up icon
- Fill up the credit card information and Billing Address Information, (The fields marked with a * are required) then choose a Payment Gateway to store the card with.
- After click on **Save**.
- After the details has been saved **Encrypted Token** and **Credit Card Status** is being auto generated.

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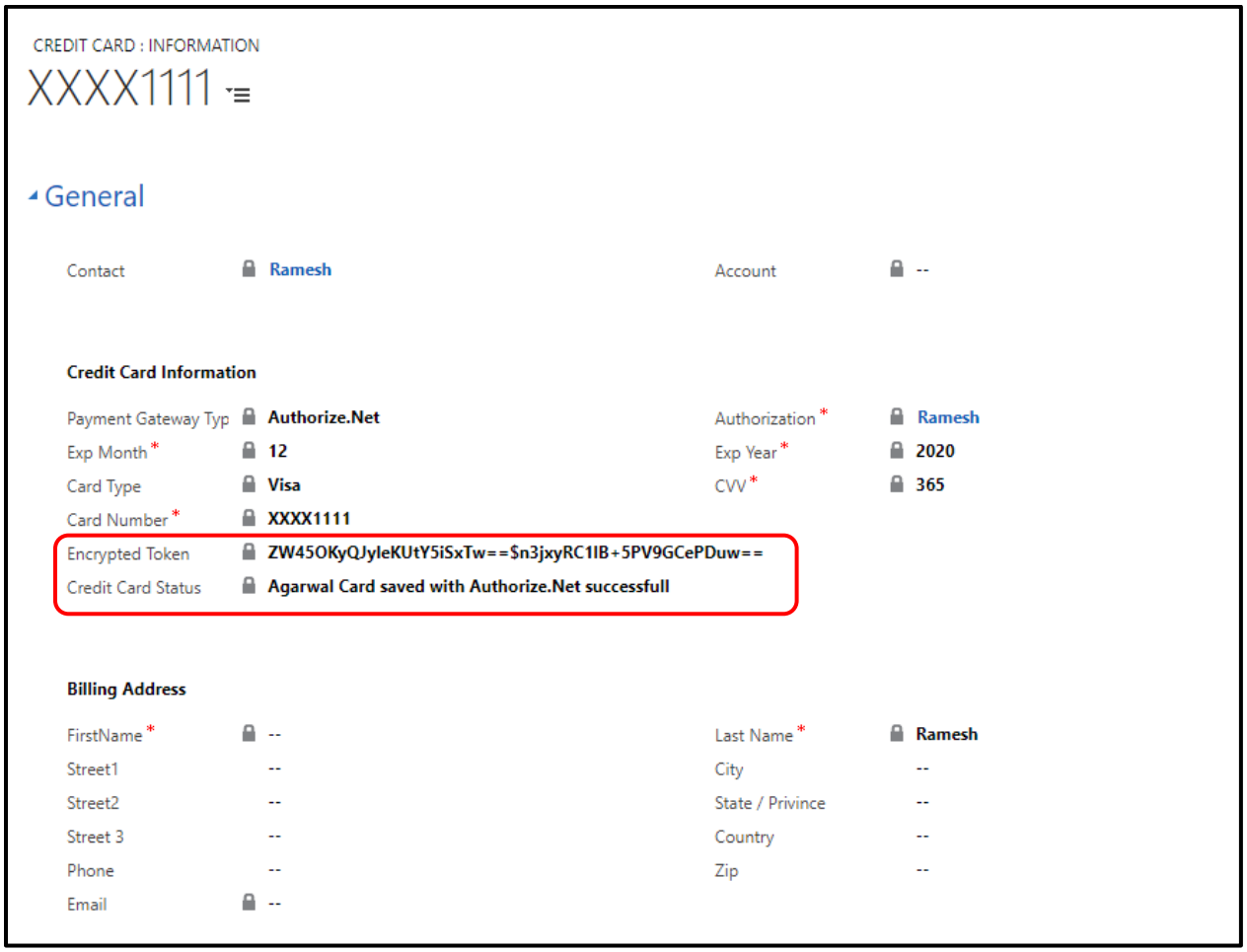

Step10:

- Navigate to Dynamics365→Sales→Contacts, and choose any Record to whom you want to do payments.
- Click on Payment Ribbon Button.

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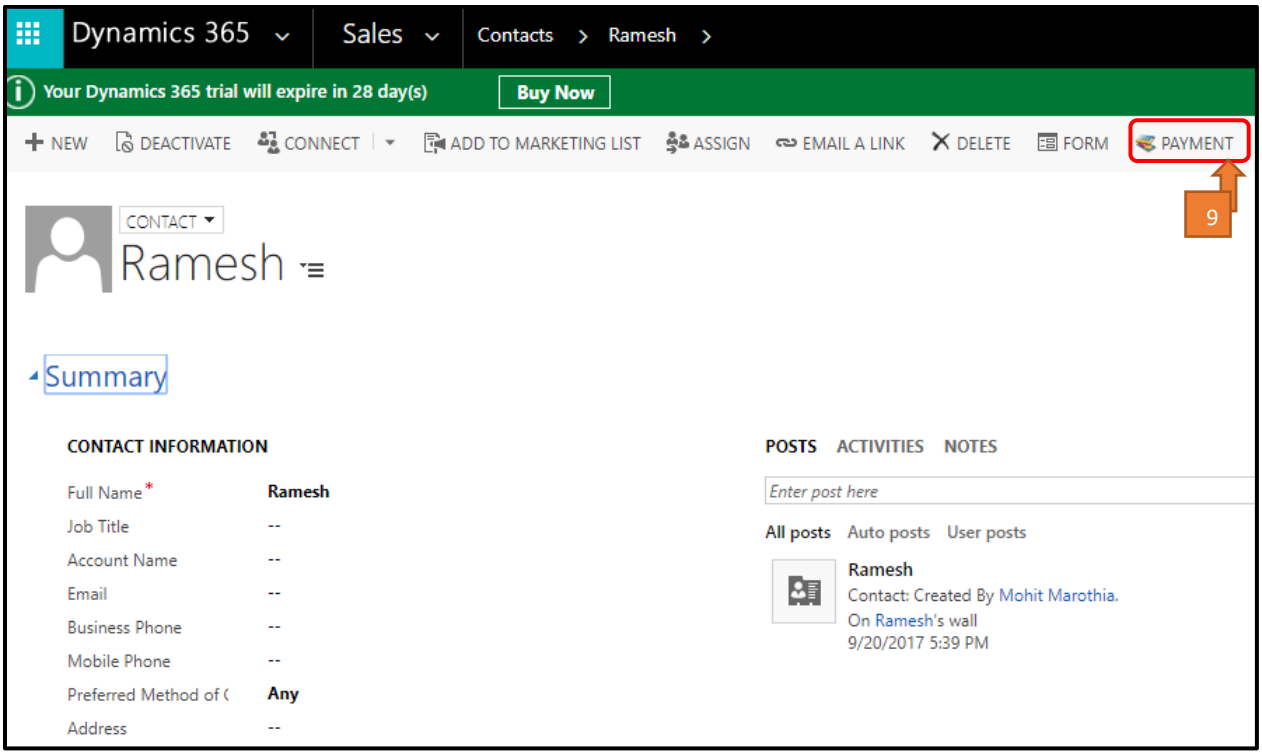

Step11:

- A new window will open for the last confirmation of payments.
- All the credit card details were automatically added.
- Once all the details is been added click on **Authorize**.
- You will get a message as "**This transaction has been approved"**.

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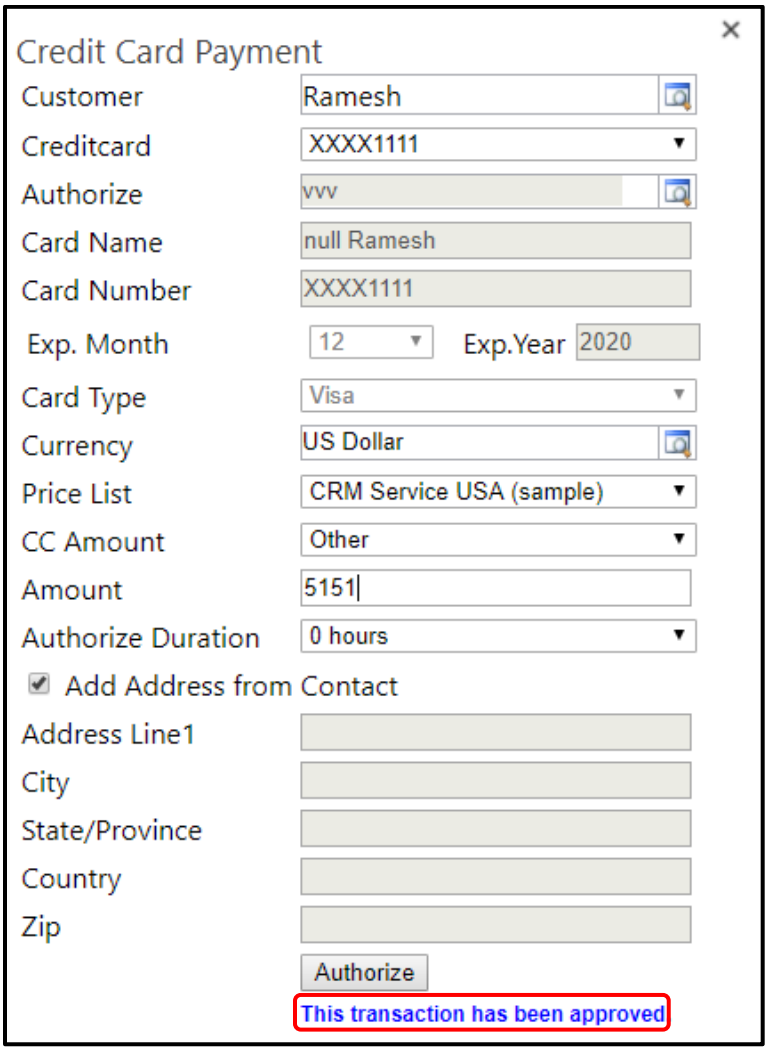

- Enter the amount according to your requirement.
- Select Authorize Duration from the Drop Down list provided.

0 Hours	For Immediate processing
24 Hours	Card will be charged after 24 hours (till such time it will be in Pending)
48 Hours	Card will be charged after 48 hours (till such time it will be in Pending)
72 Hours	Card will be charged after 72 hours (till such time it will be in Pending)

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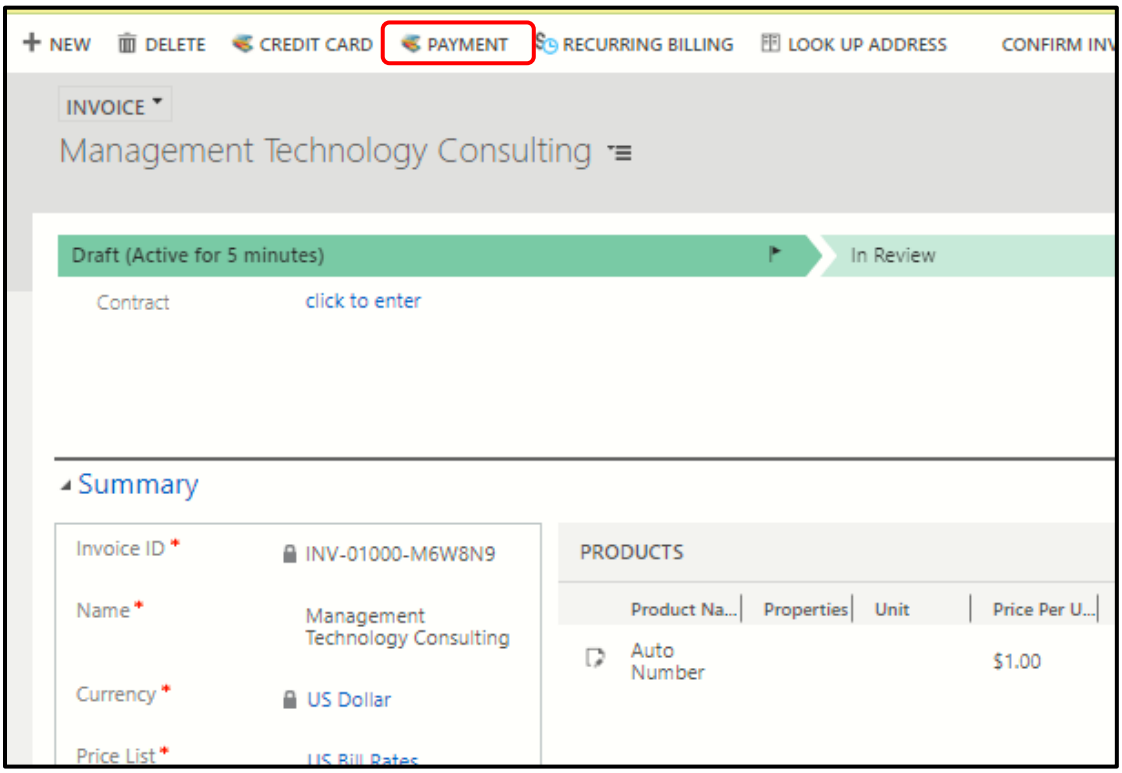
Credit Card Processing from Invoice:

- Navigate to **Dynamics 365 →Sales →Invoice →Select any invoice**.
- Click on **PAYMENT** for the further procedure.



- Select the existing credit card from the dropdown list.
- Select Transaction Duration as per your need.
- All the other fields need to be updated as accordingly.
- Click on **PAY** to process Payment. It will take 1 day to process the transaction.

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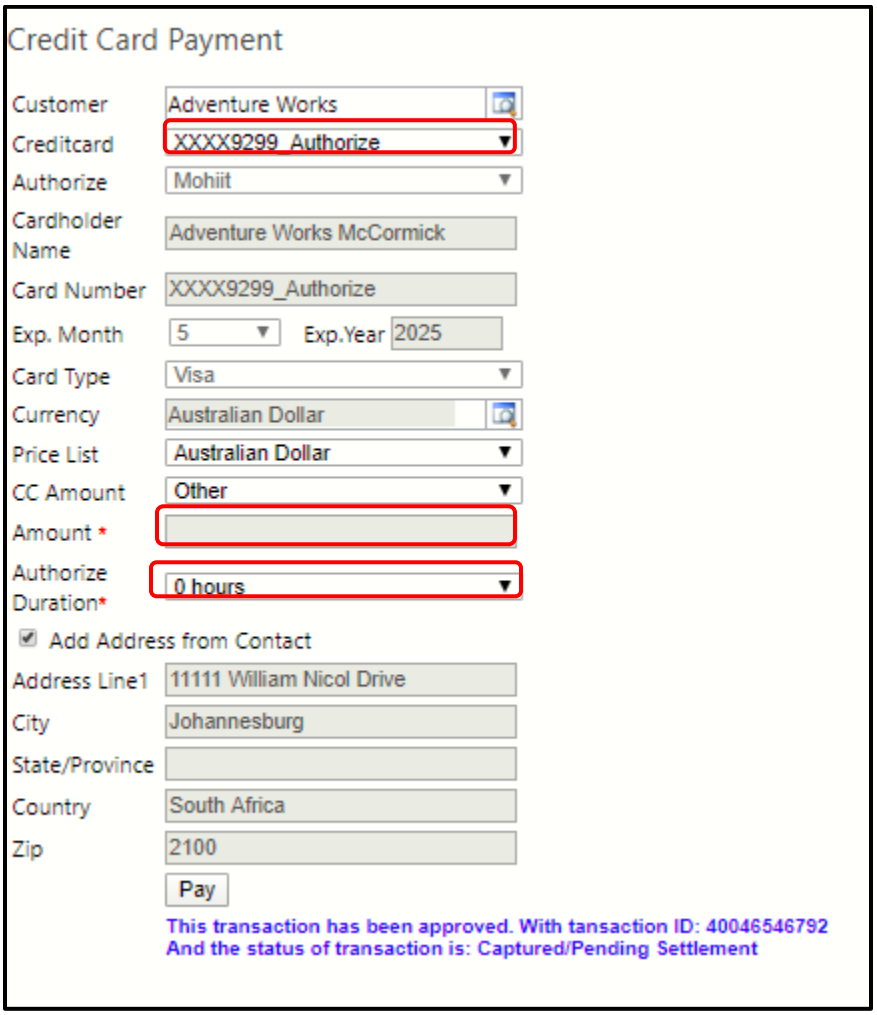
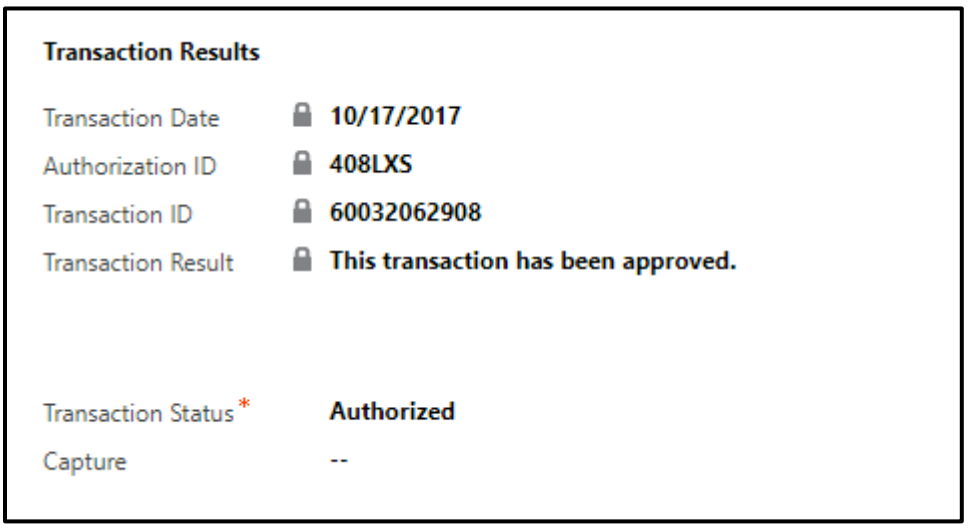


Transaction Date, Authorization ID, Transaction Id and Transaction Result are displayed.



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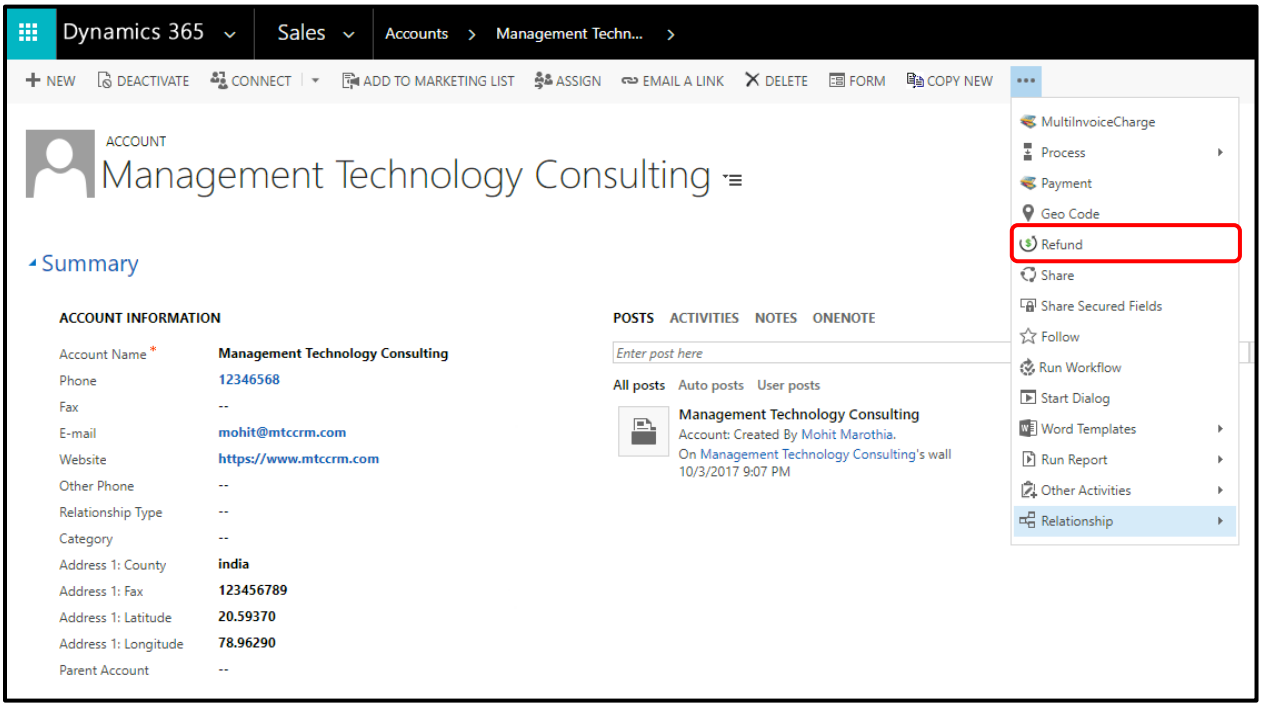
Procedure to Refund Credit Card Payment(s) to customer

If the user wishes to refund the credit card payment back to the customer, He or She can do it easily from the CRM itself. The Refund options are shown only either in Account or Contact of the CRM. One can select Refund option from Account itself or can also select the same Refund option from the Contact also.

- Navigate to **Dynamics 365 →Sales →** either **Accounts or Contacts**.
- For example, let's see how **Refund system** works on Accounts.



- Now Click on **Refund**, a new window appears.
- Credit Card Number is selected by a dropdown list.
- All the Credit card No's only pertaining to this Account (Management Technology Consulting) are displayed.
- From the list select the card you choose to refund the payment for.
- On Selecting the Card No, all the Settled Transactions related to the card are displayed for your ready reference.
- User can Enter **Description** in the box provided for reference.
- Details Such as Transaction ID, Invoice, Payment Amount, Settled On and Remarks.
- Finally Click on REFUND button.

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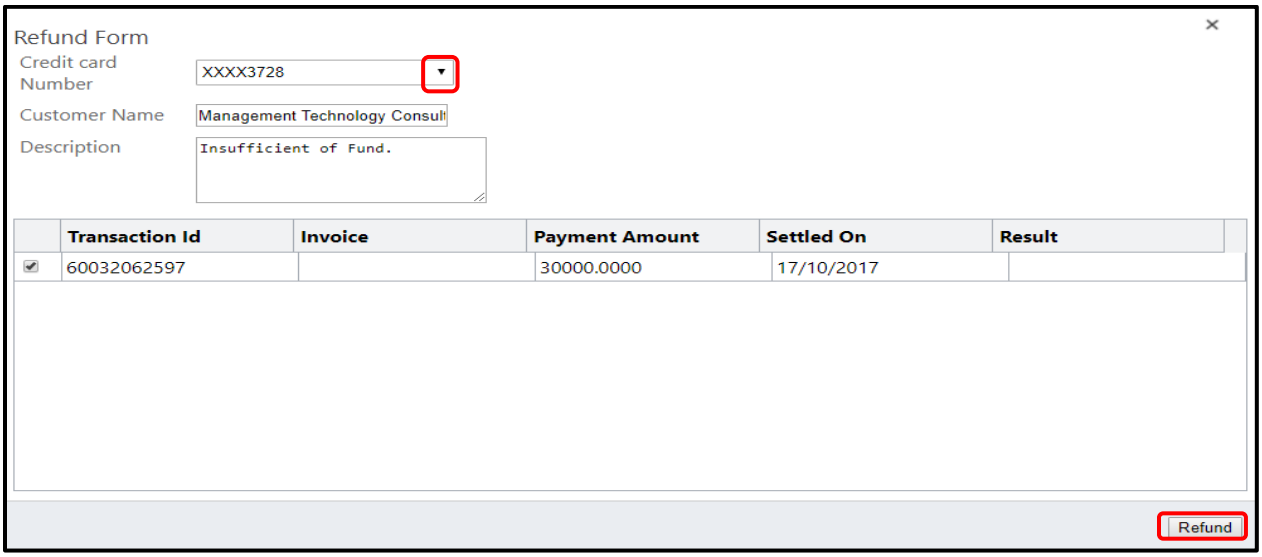
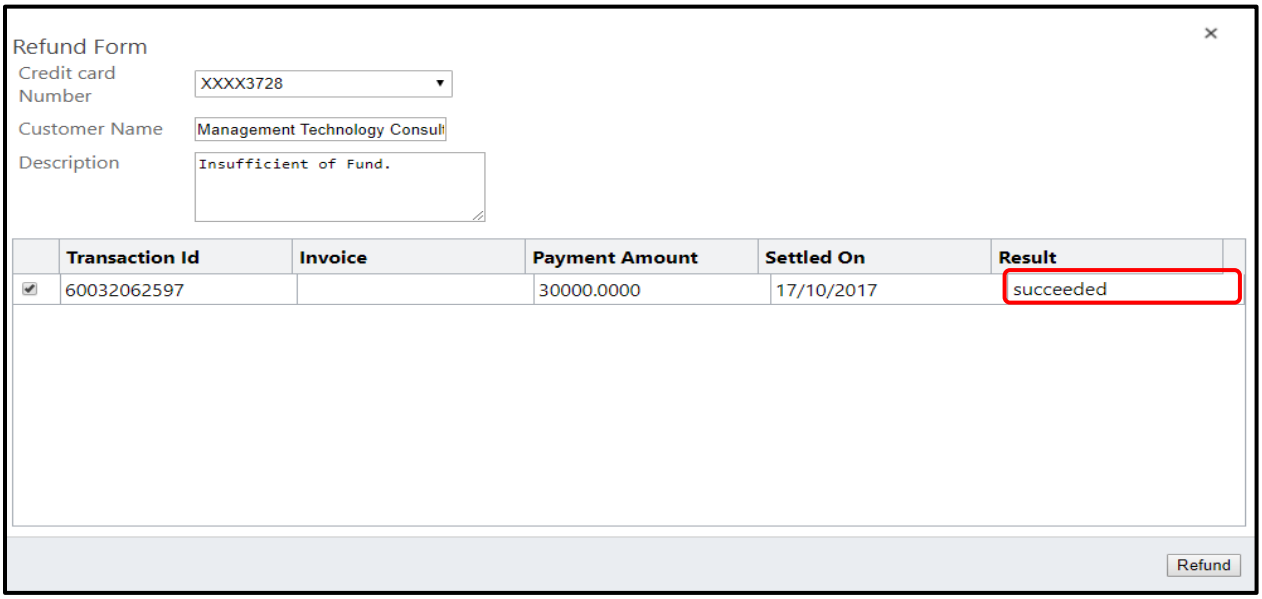


- On Successful Refund process, In Remarks it is updated as “Succeeded” as shown below.
- User can also check for the Corrections by using Advance Find option also.



- If the refund succeeded the Credit card Transaction will sent to Refunded state, Refund record goes to Inactive as shown below.

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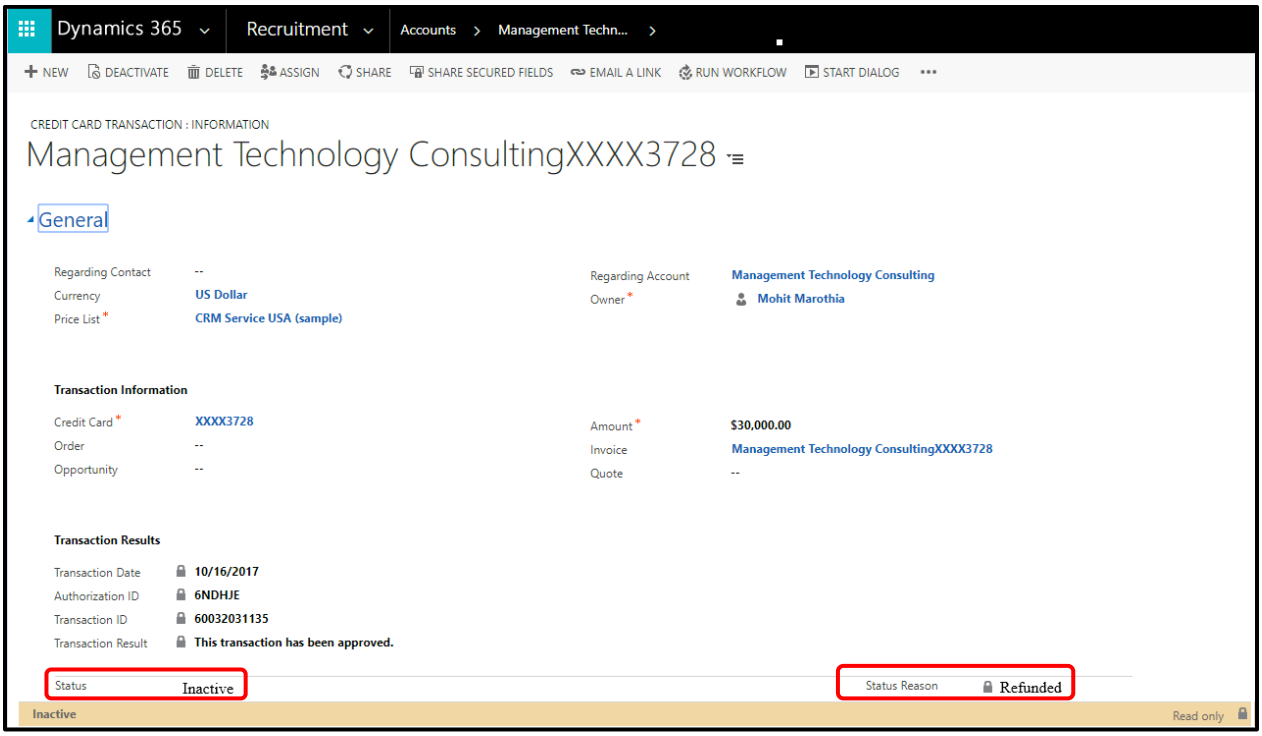

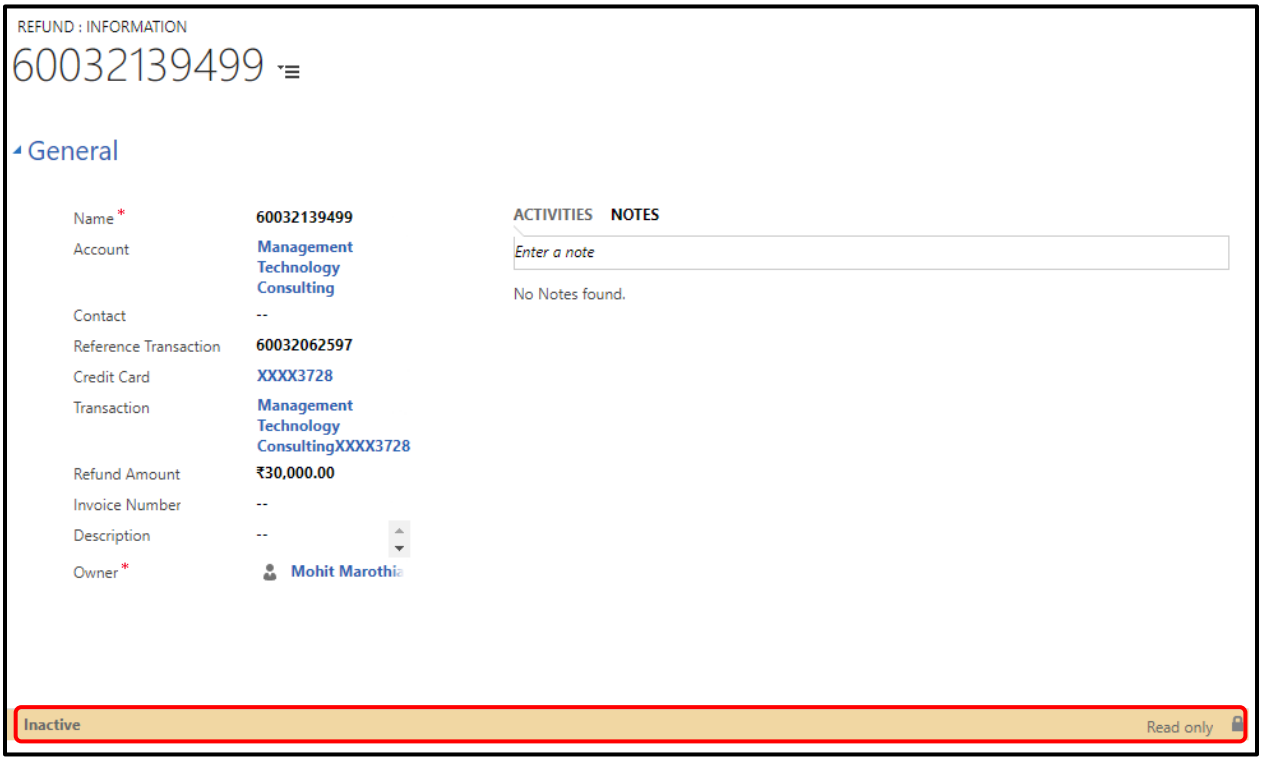

Notes:

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- Only users with the appropriate permissions will be able to access this feature.
- This feature also allows you to single full amount refund against an original transaction.
- Refunds are not allowed if transaction is more than 60 days old.
- The Transaction ID will be generated after 24 hours.

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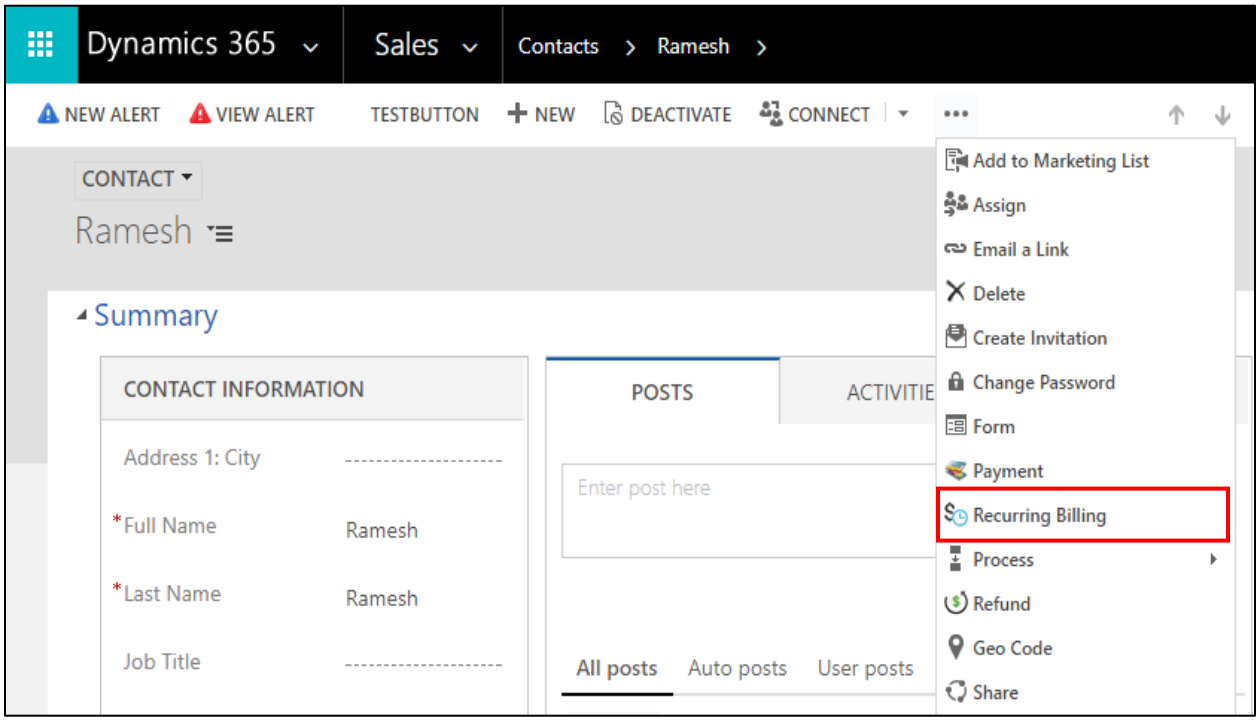
Procedure to Recurring Billing for Customers

Recurring Billing is a new significant feature implemented by MTC. Recurring Billing helps in doing automatic payments to the clients as per the occurrence period.

Payments will be done according to the frequencies defined. It will help in saving time in doing such repeated payments every month or week.

With the help of recurring billing you can add all the information of the payments like when the payment has to be done, how much to be done and till when it has to be done.

- Navigate to **Dynamics 365 →Sales →** either **Accounts or Contacts**
- For example let's see how **Recurring Billing** works on Contacts
- Now Click on **Recurring Billing**, a new window appears



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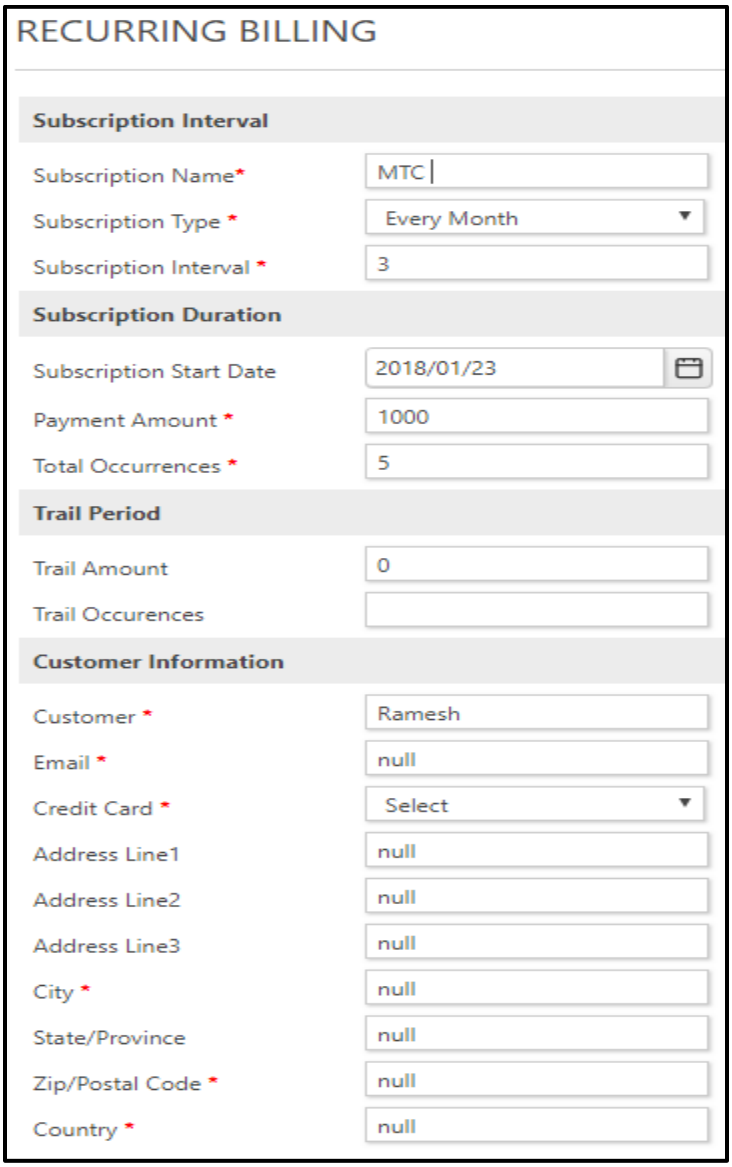

- Subscription name: Name for the Recurring Billing.
- Subscription Type: Duration of the Occurrence in (Day/Month)
- Subscription Interval: Describes no. of intervals(Ex: 3, 4, etc.)
- Subscription Start Date: Describes the date on which Recurring Billing has to start.
- Payment Amount: Amount to be paid in each particular intervals.
- Total Occurrences: Describes no. of intervals within which the payment has to be done.

Trail Period: Users can provide the amount & Occurrence for a trail version.

Customer Information: Provide all the necessary information related to the customer.

0 Hours	For Immediate processing

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24 Hours	Card will be charged after 24 hours (till such time it will be in Pending)
48 Hours	Card will be charged after 48 hours (till such time it will be in Pending)
72 Hours	Card will be charged after 72 hours (till such time it will be in Pending)

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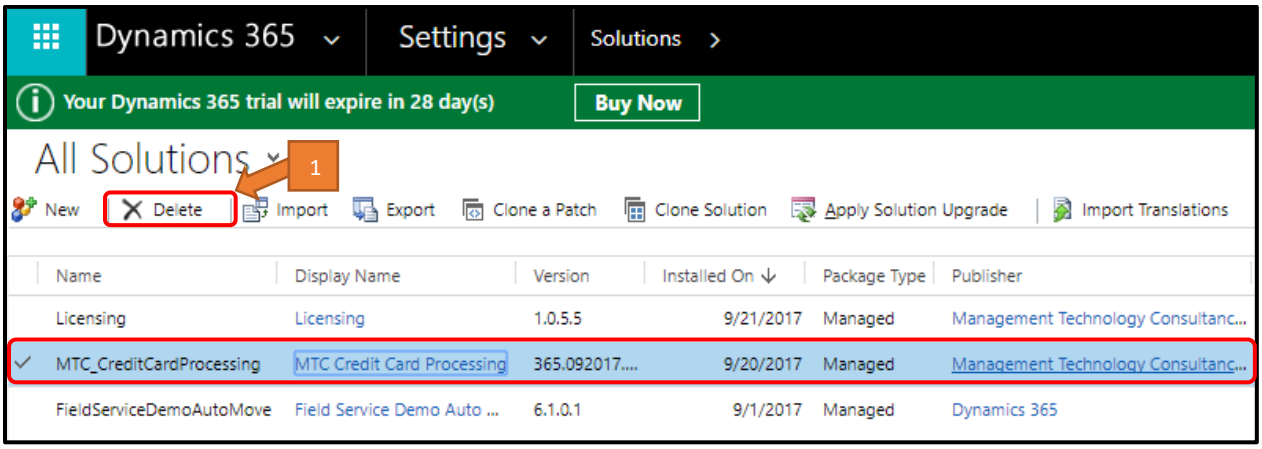
How to Uninstall Credit Card Processing in your Dynamics 365?

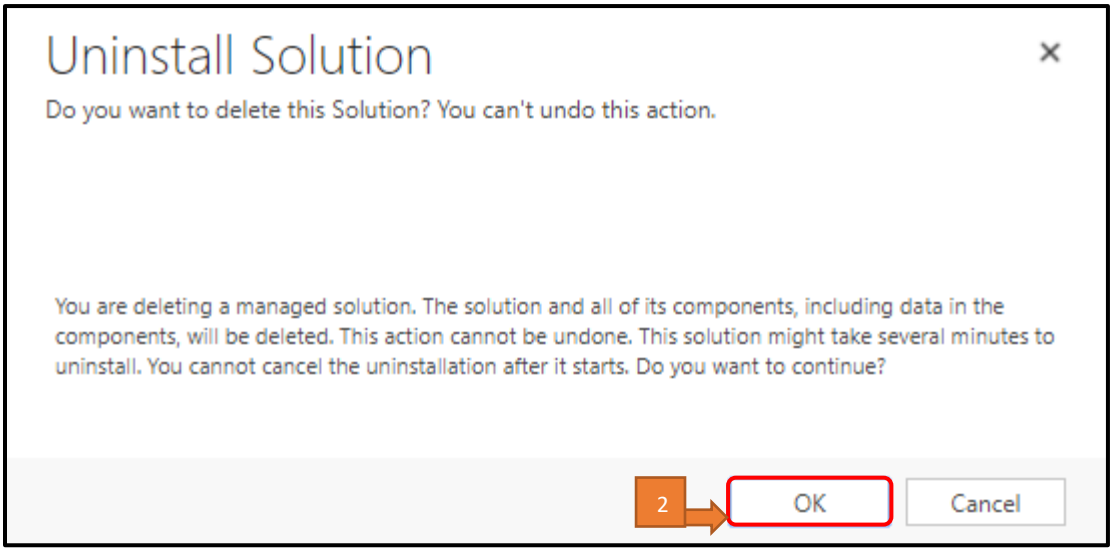
Step1:

- Navigate to **Dynamic 365 -> Settings** and click on **Solutions.**
- Select the **MTC_CreditCardProcessing** solution and click on **Delete.**



Step2:

- Click on **OK** to start uninstallation process of **MTC_CreditCardProcessing.**



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