

User Guide



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Solution Version: 20152016_062016_1_0_managed



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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.

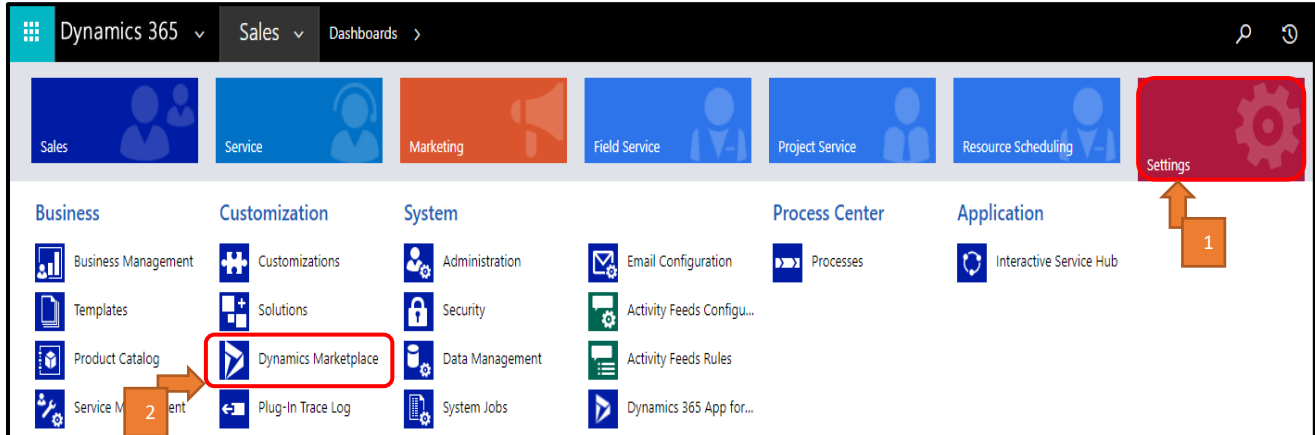
- Store customer credit card information securely within CRM field level security. Or for greater compliance to Visa card regulations and best practice standards, keep customer credit card information out of your company, remove liability and responsibility, but maintain accessibility to your customer 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.

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.

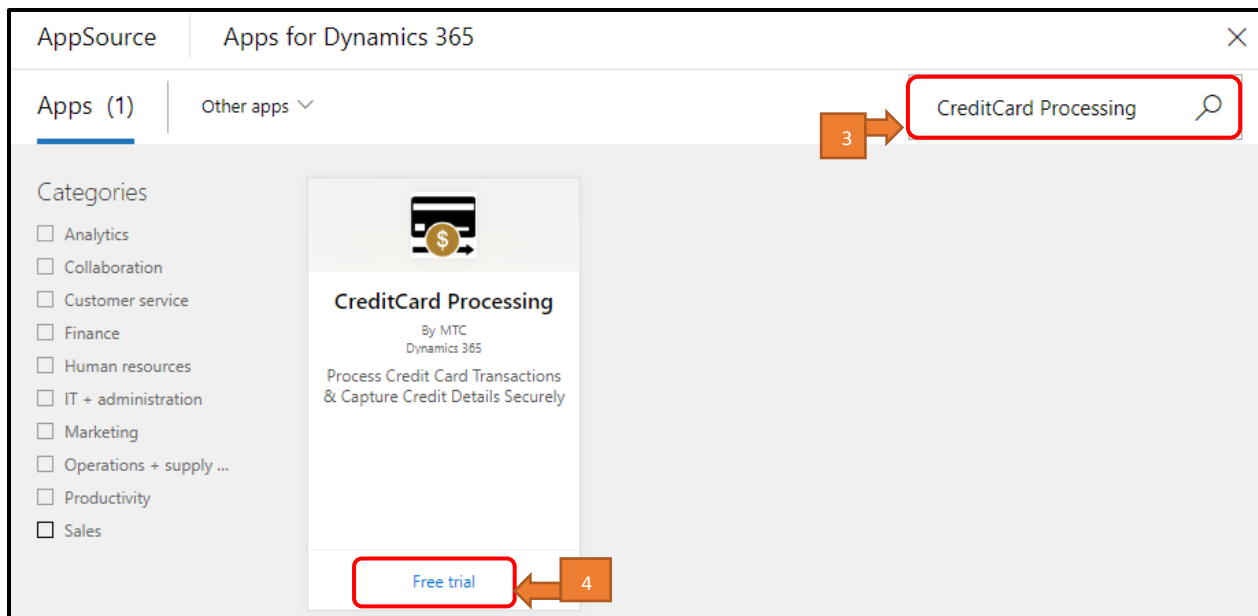
Step1:

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



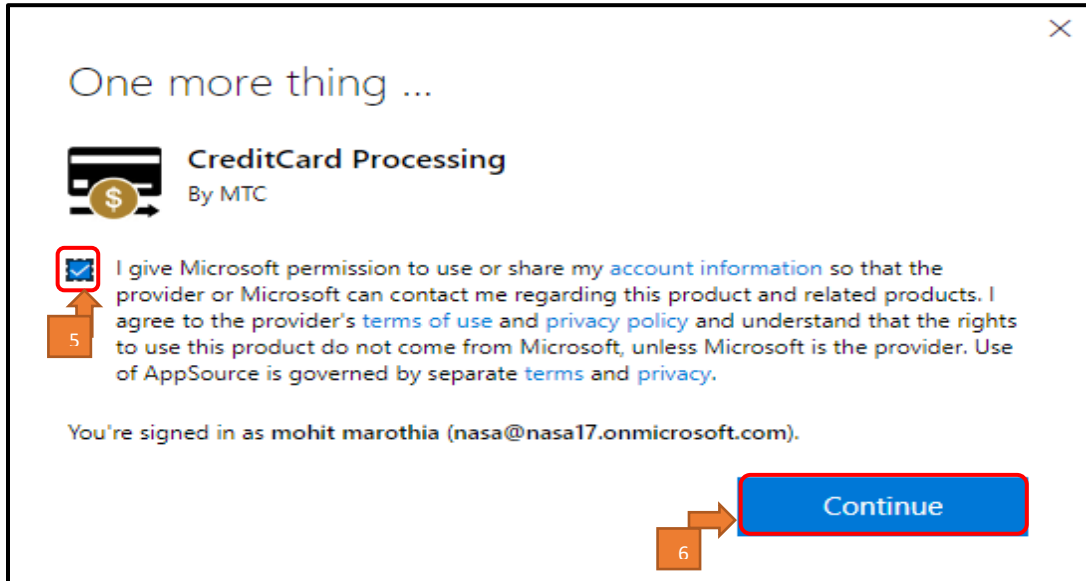
Step2:

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




Step3:

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



One more thing ...

 **CreditCard Processing**
By MTC

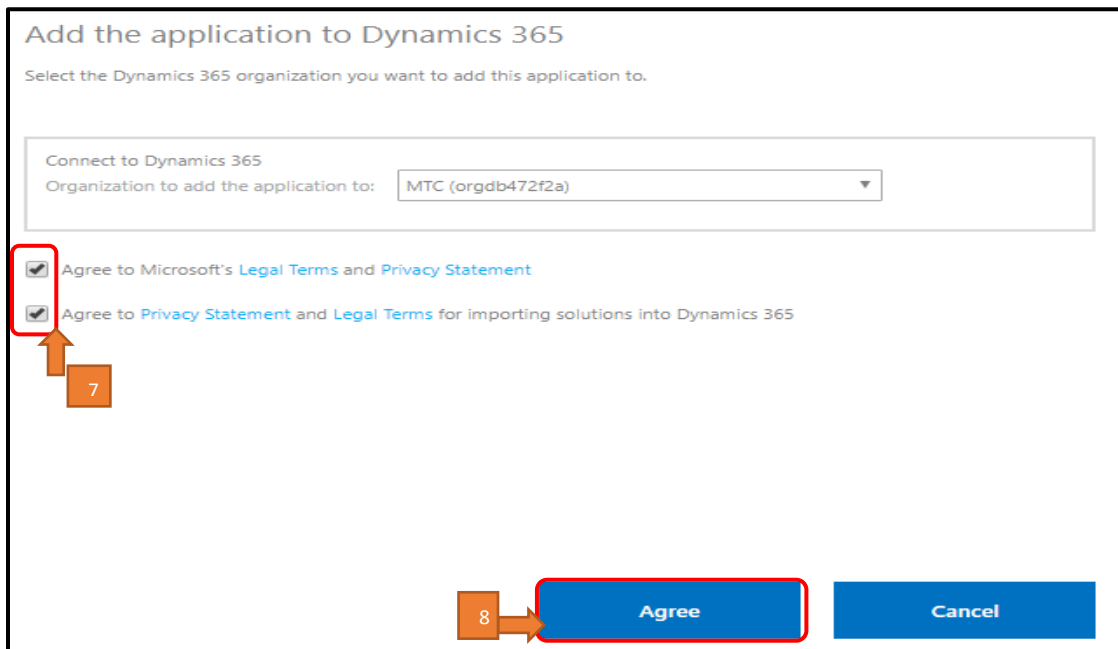
☒ I give Microsoft permission to use or share my account information so that the provider or Microsoft can contact me regarding this product and related products. I agree to the provider's [terms of use](#) and [privacy policy](#) and understand that the rights to use this product do not come from Microsoft, unless Microsoft is the provider. Use of AppSource is governed by separate [terms](#) and [privacy](#).

You're signed in as **mohit marothia** (nasa@nasa17.onmicrosoft.com).

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.



Add the application to Dynamics 365

Select the Dynamics 365 organization you want to add this application to.

Connect to Dynamics 365

Organization to add the application to: MTC (orgdb472f2a)

☒ Agree to Microsoft's [Legal Terms](#) and [Privacy Statement](#)

☒ Agree to [Privacy Statement](#) and [Legal Terms](#) for importing solutions into Dynamics 365

Agree **Cancel**

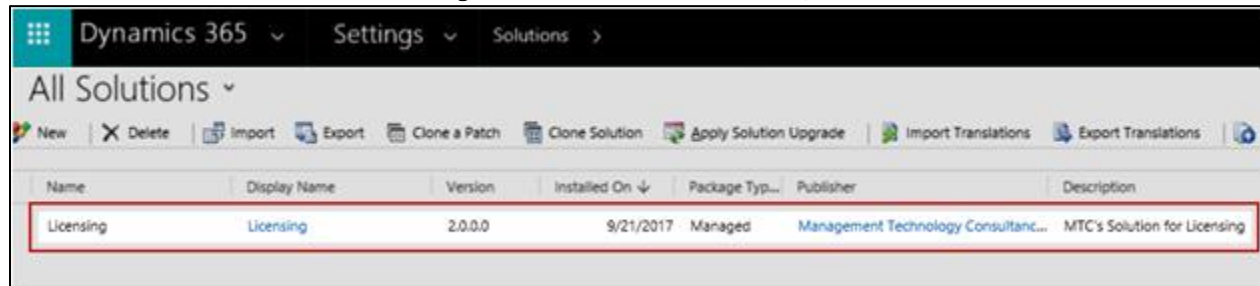
Step5:

- 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

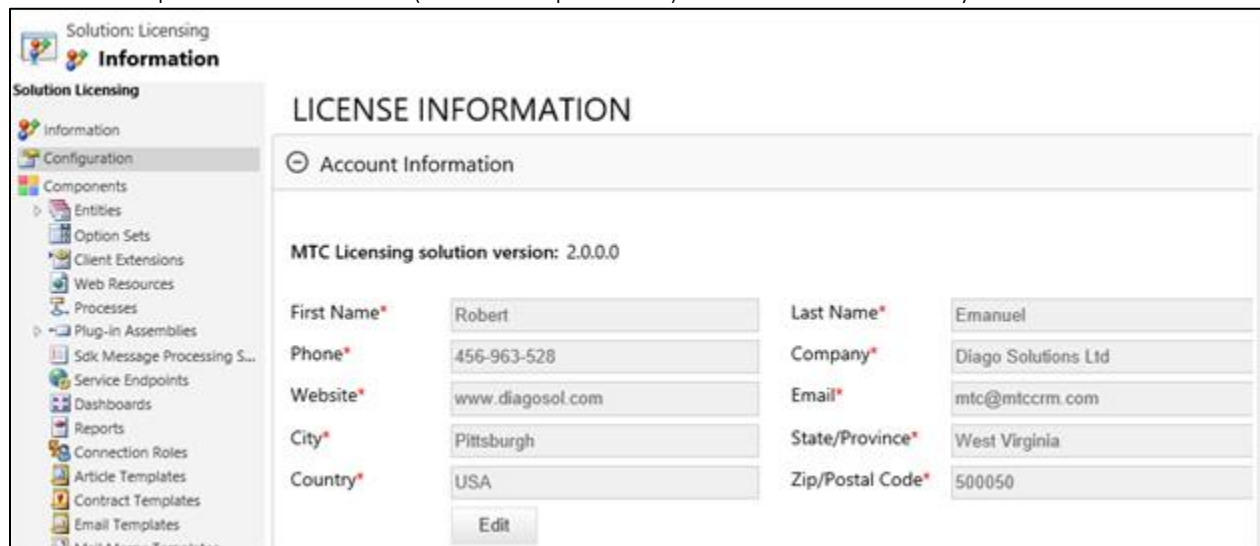
Step6:

- 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.



Name	Display Name	Version	Installed On	Package Typ...	Publisher	Description
Licensing	Licensing	2.0.0.0	9/21/2017	Managed	Management Technology Consultanc...	MTC's Solution for Licensing

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



Solution: Licensing

Information

LICENSE INFORMATION

Account Information

MTC Licensing solution version: 2.0.0.0

First Name*	Robert	Last Name*	Emanuel
Phone*	456-963-528	Company*	Diago Solutions Ltd
Website*	www.diagosol.com	Email*	mtc@mtccrm.com
City*	Pittsburgh	State/Province*	West Virginia
Country*	USA	Zip/Postal Code*	500050

Edit

- 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.

LICENSE INFORMATION										
Account Information										
Activated Bundle Products										
Activated Products										
Product Name	Version / Update	Installed On	Expiry Date	Purchase License	Generate License	License Key	License Type	Enabled Users	Licensed Users	User Guide
Activity Timer	365.082017.3.3	Oct 2, 2017	Oct 11, 2017			fd-gkPz2UH9aMaxB656EXB40thqle...	Trial	3	0	
Calendar Pro	365.092017.3.4	Oct 6, 2017	Oct 21, 2017			fd-gkPz2UH9aMaxB656EXB40thqle...	Trial	3	0	
MTC_CreditCardProcessing	20152016.062016.1.0	Sep 25, 2017						3		
Email To Case	20152016.062016.1.0	Sep 28, 2017						3		
Super Grid	2016.062017.4.8	Sep 25, 2017	Oct 13, 2017			fd-gkPz2UH9aMaxB656EXB40thqle...	Trial	3	0	
Download More Products										

- 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:

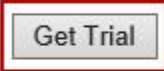
a. Click on Key Icon under Generate License of Activated Products for MTC’s Credit Card Processing.

LICENSE INFORMATION										
Account Information										
Activated Bundle Products										
Activated Products										
Product Name	Version / Update	Installed On	Expiry Date	Purchase License	Generate License	License Key	License Type	Enabled Users	Licensed Users	User Guide
Activity Timer	365.082017.3.3	Oct 2, 2017	Oct 11, 2017			fd-gkPz2UH9aMaxB656EXB40thqle...	Trial	3	0	
Calendar Pro	365.092017.3.4	Oct 6, 2017	Oct 21, 2017			fd-gkPz2UH9aMaxB656EXB40thqle...	Trial	3	0	
MTC_CreditCardProcessing	20152016.062016.1.0	Sep 25, 2017						3		
Email To Case	20152016.062016.1.0	Sep 28, 2017						3		
Super Grid	2016.062017.4.8	Sep 25, 2017	Oct 13, 2017			fd-gkPz2UH9aMaxB656EXB40thqle...	Trial	3	0	
Download More Products										

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.



☒ I want to start my one-time 15 day free trial



PS: For extension of trial period please write to salesteam@mtccrm.com

☐ I purchased the product from MTC Web Portal

☐ I want to manually enter the license key provided by MTC Team

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

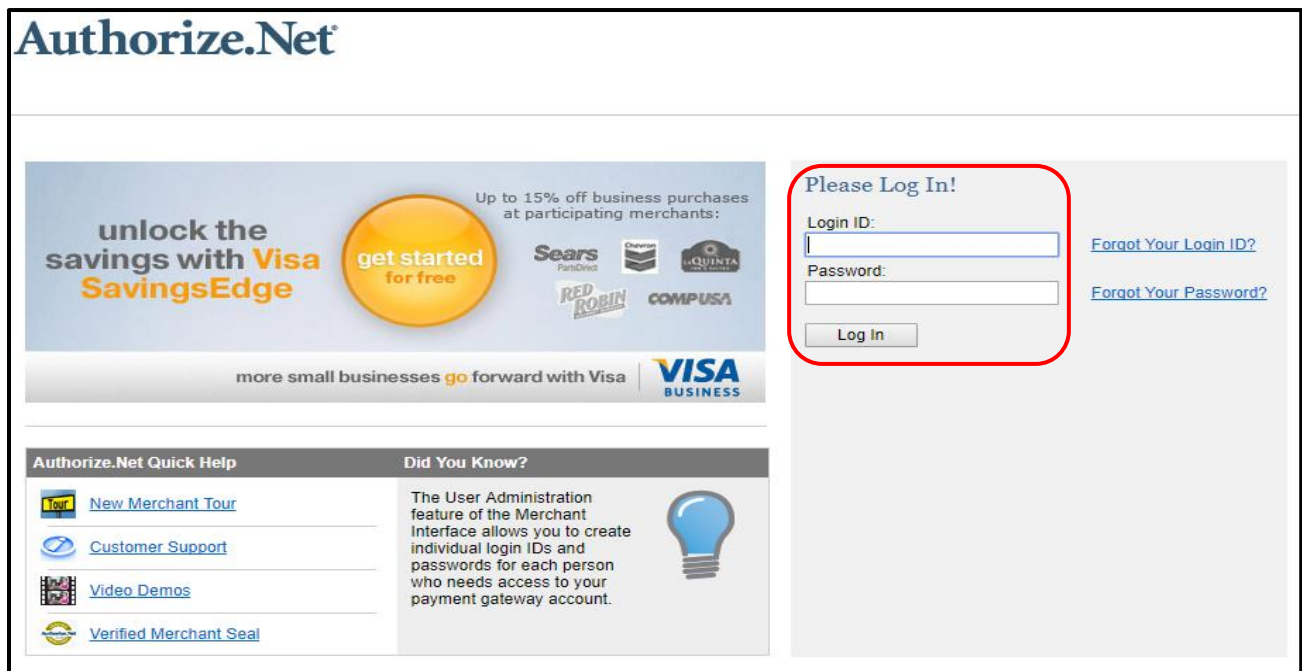
Configuration of Credit Card Processing

Step1:

Register with Authorize.net

Step1:

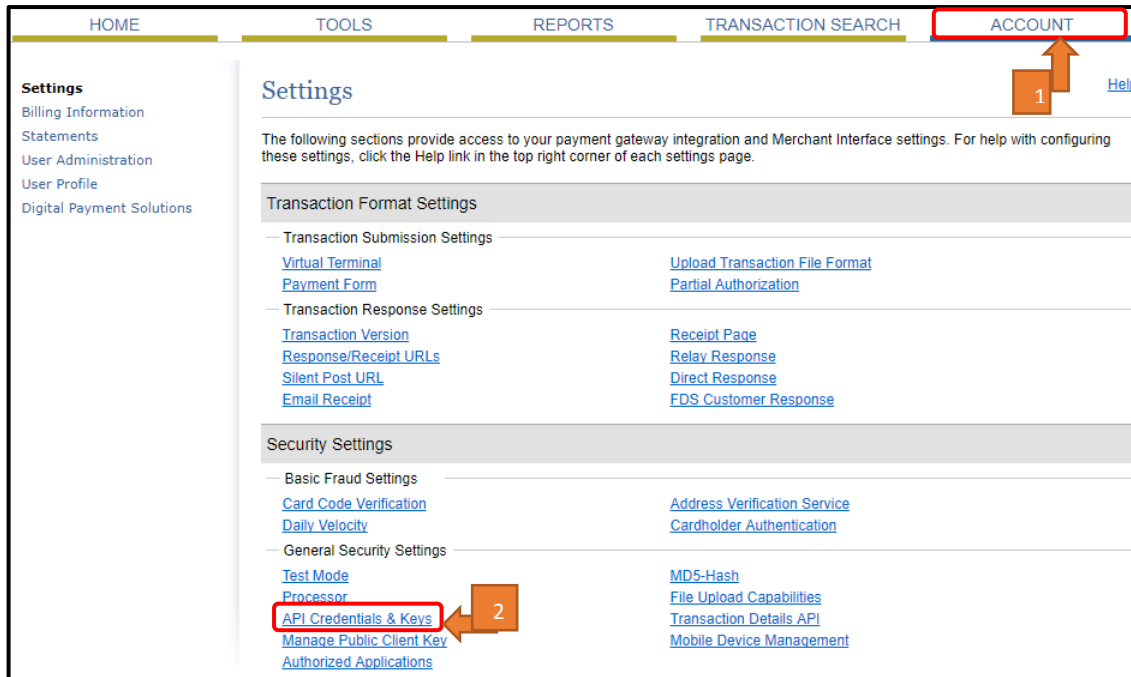
- The user has to register with Authorize.net a gateway solution. First get **API Login code** and **API Transaction Key**. Unless these codes are obtained from Authorize.net the user cannot process the credit card processing solution.
- Login to <https://account.authorize.net/>



The screenshot shows the Authorize.Net login page. At the top, the Authorize.Net logo is displayed. Below it, there is a promotional banner for Visa SavingsEdge. To the right of the banner is a login section titled "Please Log In!". This section contains two input fields: "Login ID:" and "Password:". Below these fields is a "Log In" button. To the right of the input fields are two links: "Forgot Your Login ID?" and "Forgot Your Password?". Below the login section, there is a "Did You Know?" section with a lightbulb icon and a "The User Administration" feature description. On the left side, there is an "Authorize.Net Quick Help" section with links for "New Merchant Tour", "Customer Support", "Video Demos", and "Verified Merchant Seal".

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.



HOME **TOOLS** **REPORTS** **TRANSACTION SEARCH** **ACCOUNT** [Help](#)

Settings
 Billing Information
 Statements
 User Administration
 User Profile
 Digital Payment Solutions

Settings

The following sections provide access to your payment gateway integration and Merchant Interface settings. For help with configuring these settings, click the Help link in the top right corner of each settings page.

Transaction Format Settings

- Transaction Submission Settings
 - [Virtual Terminal](#)
 - [Payment Form](#)
 - [Upload Transaction File Format](#)
 - [Partial Authorization](#)
- Transaction Response Settings
 - [Transaction Version](#)
 - [Response/Receipt URLs](#)
 - [Silent Post URL](#)
 - [Email Receipt](#)
 - [Receipt Page](#)
 - [Relay Response](#)
 - [Direct Response](#)
 - [FDS Customer Response](#)

Security Settings

- Basic Fraud Settings
 - [Card Code Verification](#)
 - [Daily Velocity](#)
 - [Address Verification Service](#)
 - [Cardholder Authentication](#)
- General Security Settings
 - [Test Mode](#)
 - [Processor](#)
 - [API Credentials & Keys](#)
 - [Manage Public Client Key](#)
 - [Authorized Applications](#)
 - [MD5-Hash](#)
 - [File Upload Capabilities](#)
 - [Transaction Details API](#)
 - [Mobile Device Management](#)

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**.

HOME
TOOLS
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TRANSACTION SEARCH
ACCOUNT

Settings
 Billing Information
 Statements
 User Administration
 User Profile
 Digital Payment Solutions

API Credentials & Keys [Help](#)

Your API Login ID and Transaction Key are unique pieces of information specifically associated with your payment gateway account. However, the API login ID and Transaction Key are NOT used for logging into the Merchant Interface. These two values are only required when setting up an Internet connection between your e-commerce Web site and the payment gateway. They are used by the payment gateway to authenticate that you are authorized to submit Web site transactions.

A Signature Key is applicable if your solution uses our hosted payment form, or uses the Direct Post Method (DPM) to submit transactions. It is also used for authenticating transaction responses from our APIs, including but not limited to Relay Response and Silent Post.

IMPORTANT: The API Login ID, Transaction Key and Signature Key should not be shared with anyone. Be sure to store these values securely and change the Transaction Key regularly to further strengthen the security of your account.

For more information about the API Login ID, Transaction Key and Signature Key, please refer to the [Reference & User Guides](#) or contact your Web developer.

API Login ID: 2Ld5Mq7W
 API Login ID Last Obtained: 09/21/2017 23:20:37
 Transaction Key Last Obtained: 09/21/2017 23:21:00

Create New Key(s)

* Required Fields

You may obtain a new Transaction Key or Signature Key as often as you wish by providing your Secret Answer. You may choose to disable the old one immediately by checking the Disable Old Transaction Key Immediately or Disable Old Signature Key Immediately option. If you do not immediately disable the old value, it will automatically expire in 24 hours.

Secret Question: What is your pet's name?
 Secret Answer: *
 Obtain: ☐ New Transaction Key ☐ New Signature Key

Submit
 Cancel

Step4:

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

Authorize.Net
Welcome: TestFirstName TestLastName


HOME
TOOLS
REPORTS
TRANSACTION SEARCH
ACCOUNT

Virtual Terminal
 Upload Transactions
 Recurring Billing
 Fraud Detection Suite
Customer Information Manager
 Simple Checkout
 Account Updater

Customer Information Manager [Help](#)

Use the Customer Information Manager (CIM) to create and manage customer profiles and/or use the CIM API Guide in the [Integration Center](#) to integrate CIM to your website or proprietary business application.

Note: Integrating the CIM API to your Web site requires the expertise of a Web developer. If you need help we recommend contacting an [Authorize.Net Certified Developer](#)


Account Updater
 The Account Updater service works with CIM to keep the credit card information on file up to date for your customers' stored payment profiles.
[Learn more!](#)

-- Select One --
 Search
 [Advanced Search](#)

+ Add Profile | View Profile | Delete Profile

1-2 of 2 results

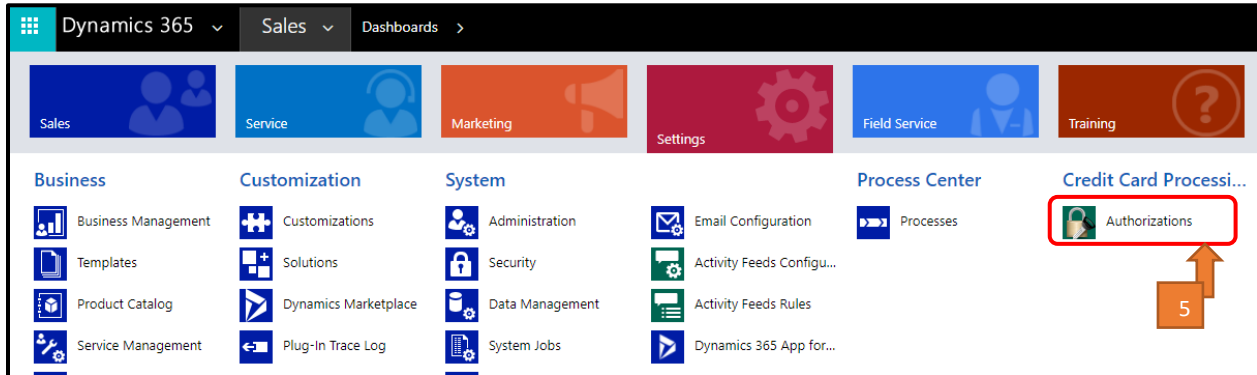
Created Date	Profile ID	Customer ID	Email	Description
22-Sep-2017 00:35:55	1813117356	1813117356		mohit mohit 1676
22-Sep-2017 00:05:57	1813116981	1813116981		mohit agarwal 1111

1-2 of 2 results

Show: 25 results per page

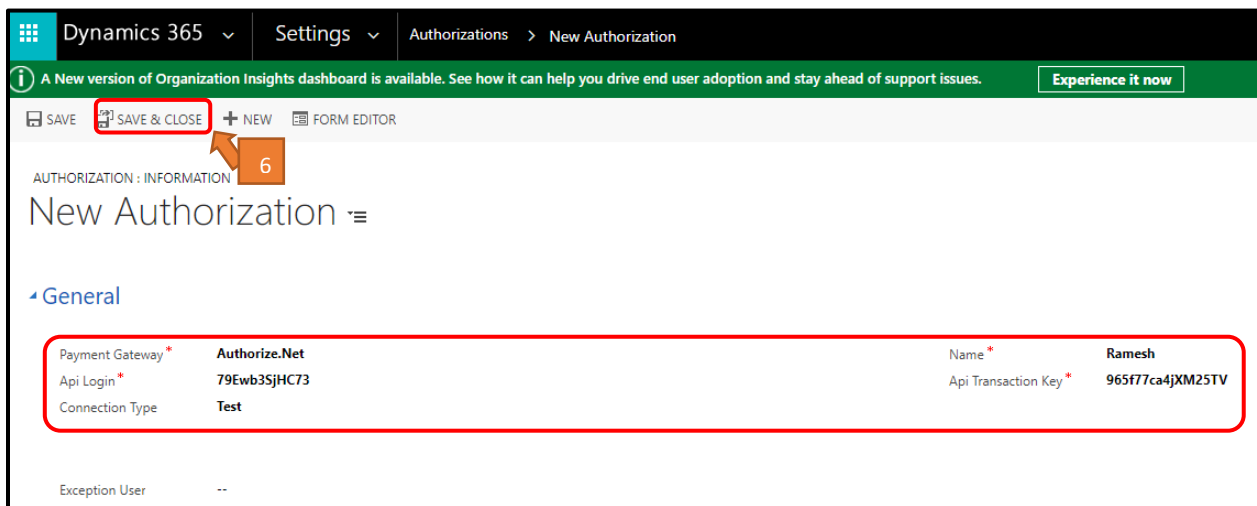
Step5:

- 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**.



SAVE & CLOSE

AUTHORIZATION : INFORMATION

New Authorization

General

Payment Gateway *	Authorize.Net	Name *	Ramesh
Api Login *	79Ewb35JHC73	Api Transaction Key *	965f77ca4jXM25TV
Connection Type	Test		

Exception User --

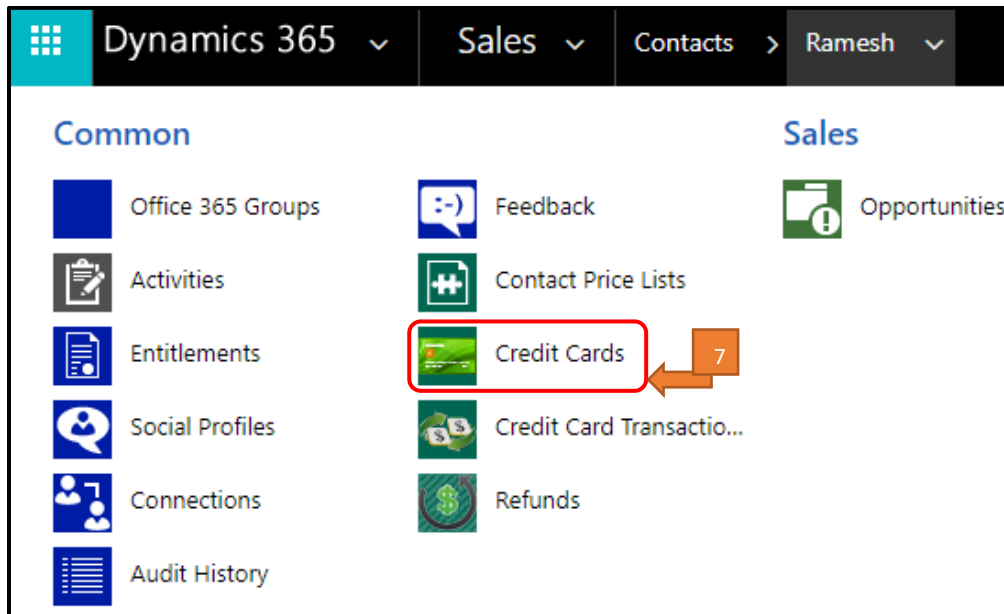
There are three ways to do a Transaction using Credit Card Processing:

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

Procedure to add Credit Card to customer.

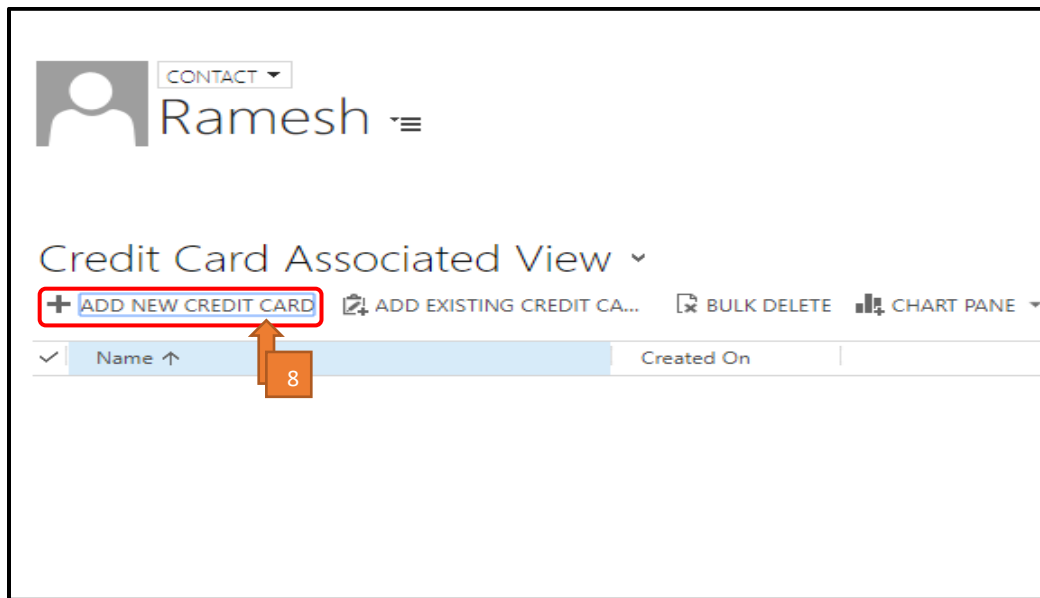
Step7:

- 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**.

**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.

CREDIT CARD : INFORMATION

XXXX1111

General

Contact

Ramesh

Account

--

Credit Card Information

Payment Gateway Type

Authorize.Net

Authorization *

Ramesh

Exp Month *

12

Exp Year *

2020

Card Type

Visa

CVV *

365

Card Number *

XXXX1111

Encrypted Token

ZW45OKyQJyleKUtY5iSxTw== \$n3jxyRC1IB+5PV9GCePDuw==

Credit Card Status

Agarwal Card saved with Authorize.Net successfull

Billing Address

FirstName *

--

Last Name *

Ramesh

Street1

--

City

--

Street2

--

State / Prvince

--

Street 3

--

Country

--

Phone

--

Zip

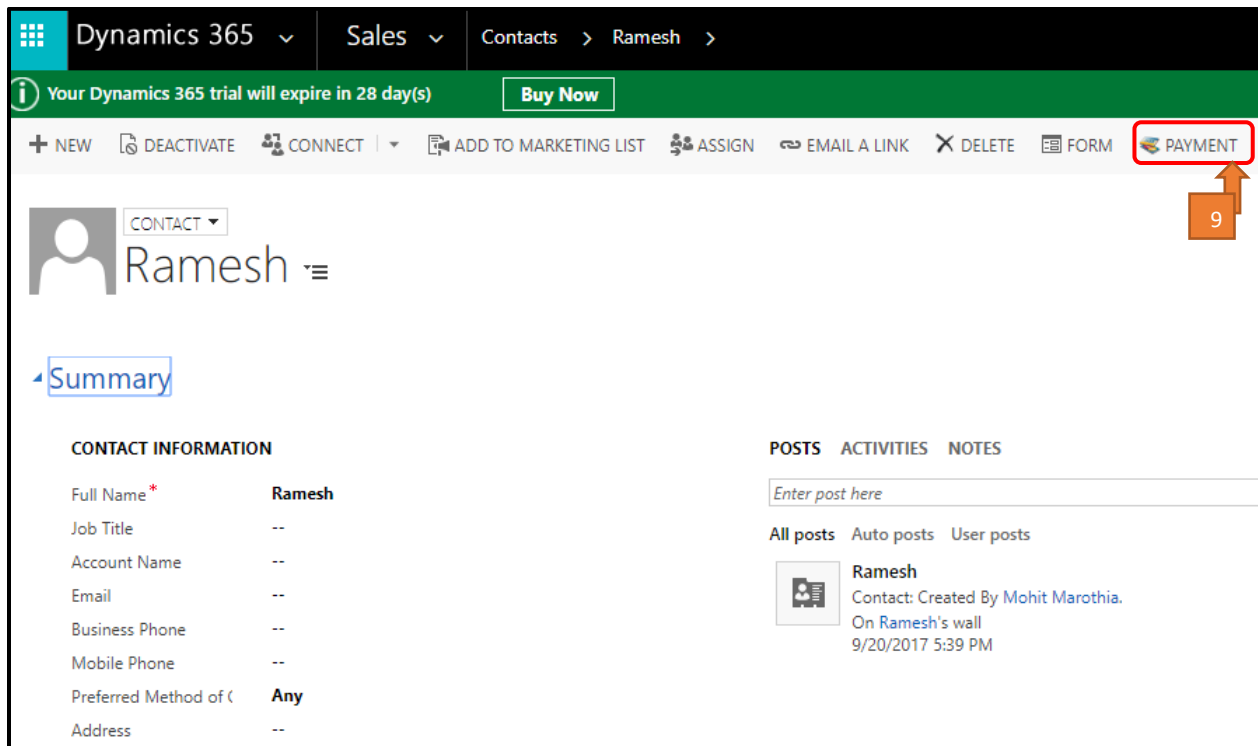
--

Email

--

Step10:

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




The screenshot shows the Microsoft Dynamics 365 interface. At the top, there's a navigation bar with 'Dynamics 365', 'Sales', and 'Contacts > Ramesh'. Below this is a green banner indicating a trial expiration: 'Your Dynamics 365 trial will expire in 28 day(s)' with a 'Buy Now' button. A secondary toolbar contains various actions: '+ NEW', 'DEACTIVATE', 'CONNECT', 'ADD TO MARKETING LIST', 'ASSIGN', 'EMAIL A LINK', 'DELETE', 'FORM', and 'PAYMENT'. The 'PAYMENT' button is highlighted with a red rectangle and an orange arrow pointing to it from a notification badge showing the number '9'. The main content area displays the contact profile for 'Ramesh', including a 'Summary' tab and a 'CONTACT INFORMATION' section with fields like Full Name, Job Title, Account Name, Email, Business Phone, Mobile Phone, Preferred Method of Contact, and Address. To the right, there are tabs for 'POSTS', 'ACTIVITIES', and 'NOTES', with a post from 'Ramesh' visible under the 'POSTS' tab.


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**”.

Credit Card Payment ✕

Customer 

Creditcard


Authorize 

Card Name

Card Number

Exp. Month Exp. Year

Card Type

Currency 

Price List

CC Amount

Amount

Authorize Duration

☒ Add Address from Contact

Address Line1

City

State/Province

Country

Zip

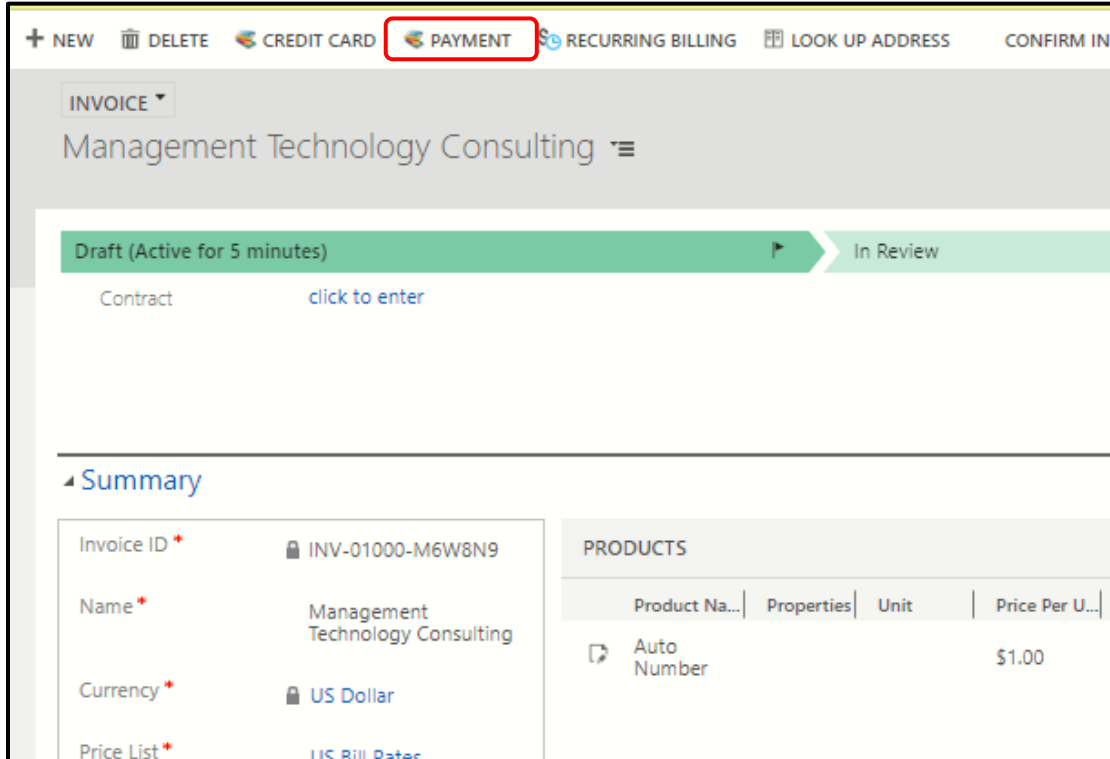
This transaction has been approved

- 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)

Credit Card Processing from Invoice:

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



+ NEW DELETE CREDIT CARD **PAYMENT** RECURRING BILLING LOOK UP ADDRESS CONFIRM INV

INVOICE ▾

Management Technology Consulting ☰

Draft (Active for 5 minutes) ▶ In Review

Contract [click to enter](#)

Summary

Invoice ID *	INV-01000-M6W8N9
Name *	Management Technology Consulting
Currency *	US Dollar
Price List *	US Bill Rates

PRODUCTS			
Product Na...	Properties	Unit	Price Per U...
Auto Number			\$1.00

- 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.





Credit Card Payment

Customer	Adventure Works
Creditcard	XXXX9299 Authorize
Authorize	Mohiit
Cardholder Name	Adventure Works McCormick
Card Number	XXXX9299_Authorize
Exp. Month	5
Exp. Year	2025
Card Type	Visa
Currency	Australian Dollar
Price List	Australian Dollar
CC Amount	Other
Amount *	
Authorize Duration*	0 hours
<input checked="" type="checkbox"/> Add Address from Contact	
Address Line1	11111 William Nicol Drive
City	Johannesburg
State/Province	
Country	South Africa
Zip	2100
<input type="button" value="Pay"/>	

This transaction has been approved. With transaction ID: 40046546792
 And the status of transaction is: Captured/Pending Settlement

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

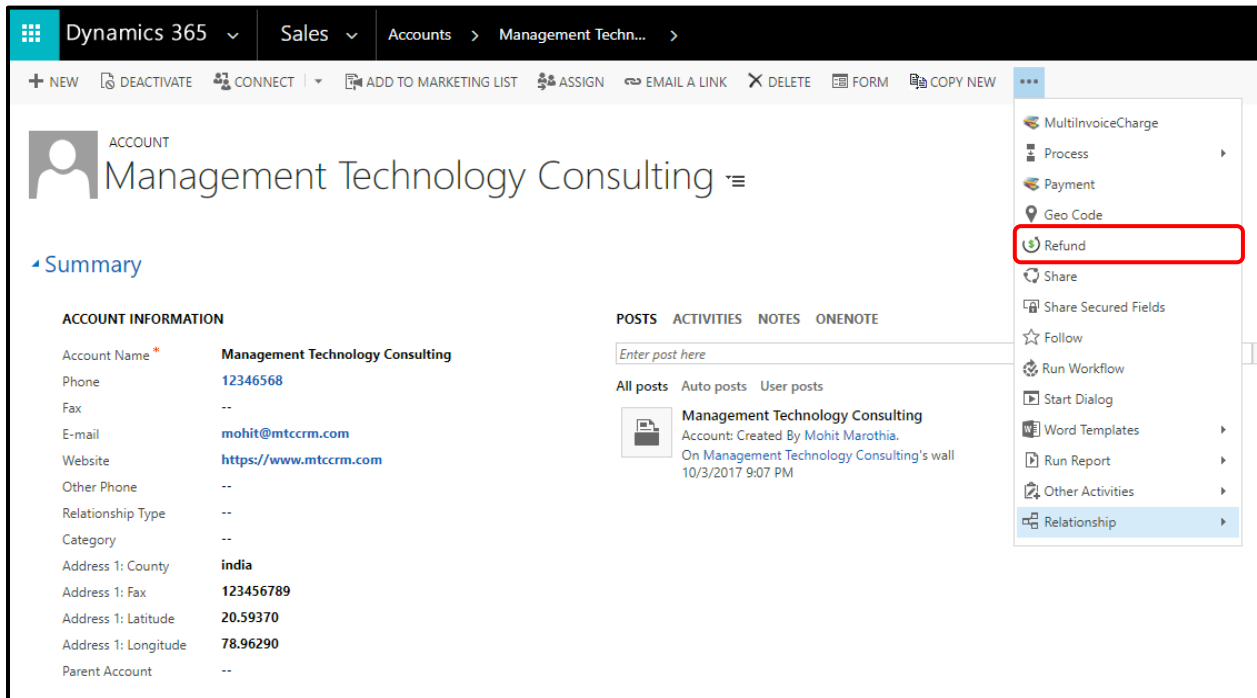
Transaction Results

Transaction Date	 10/17/2017
Authorization ID	 408LXS
Transaction ID	 60032062908
Transaction Result	 This transaction has been approved.
Transaction Status *	Authorized
Capture	--

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.



The screenshot shows the Dynamics 365 interface for an account named 'Management Technology Consulting'. The 'Summary' tab is active, displaying account information such as phone, email, and address. On the right side, a menu is open, and the 'Refund' option is highlighted with a red rectangle. Other options in the menu include MultilineCharge, Process, Payment, Geo Code, Share, Share Secured Fields, Follow, Run Workflow, Start Dialog, Word Templates, Run Report, Other Activities, and Relationship.

- 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.

Refund Form
 ✕

Credit card Number: XXXX3728

Customer Name: Management Technology Consult

Description: Insufficient of Fund.

	Transaction Id	Invoice	Payment Amount	Settled On	Result
<input checked="" type="checkbox"/>	60032062597		30000.0000	17/10/2017	

Refund

- 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.

Refund Form
 ✕

Credit card Number: XXXX3728

Customer Name: Management Technology Consult

Description: Insufficient of Fund.

	Transaction Id	Invoice	Payment Amount	Settled On	Result
<input checked="" type="checkbox"/>	60032062597		30000.0000	17/10/2017	succeeded

Refund

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

Dynamics 365 | **Recruitment** | **Accounts** > **Management Techn...**

NEW | DEACTIVATE | DELETE | ASSIGN | SHARE | SHARE SECURED FIELDS | EMAIL A LINK | RUN WORKFLOW | START DIALOG

CREDIT CARD TRANSACTION : INFORMATION

Management Technology ConsultingXXXX3728

General

Regarding Contact	--	Regarding Account	Management Technology Consulting
Currency	US Dollar	Owner	Mohit Marothia
Price List	CRM Service USA (sample)		

Transaction Information

Credit Card	XXXX3728	Amount	\$30,000.00
Order	--	Invoice	Management Technology ConsultingXXXX3728
Opportunity	--	Quote	--

Transaction Results

Transaction Date	10/16/2017
Authorization ID	6NDHJE
Transaction ID	60032031135
Transaction Result	This transaction has been approved.

Status: **Inactive** | Status Reason: **Refunded**

Inactive | Read only

REFUND : INFORMATION

60032139499

General

Name	60032139499	ACTIVITIES NOTES
Account	Management Technology Consulting	
Contact	--	Enter a note
Reference Transaction	60032062597	No Notes found.
Credit Card	XXXX3728	
Transaction	Management Technology ConsultingXXXX3728	
Refund Amount	₹30,000.00	
Invoice Number	--	
Description	--	
Owner	Mohit Marothia	

Inactive | Read only

Notes:

- 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.

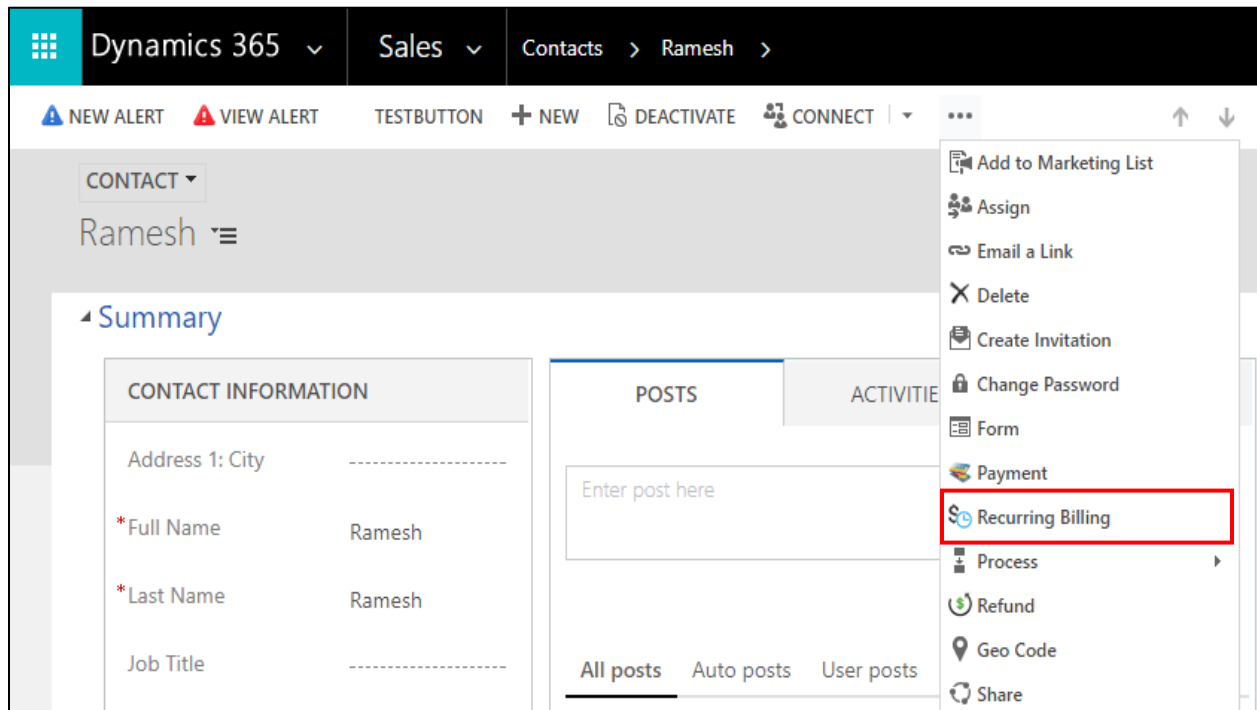
Procedure to Recurring Billing for Customers

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



The screenshot displays the Dynamics 365 user interface. The top navigation bar shows 'Dynamics 365', 'Sales', and 'Contacts > Ramesh >'. Below the navigation bar, there are buttons for 'NEW ALERT', 'VIEW ALERT', 'TESTBUTTON', '+ NEW', 'DEACTIVATE', and 'CONNECT'. The main content area is titled 'CONTACT' and shows the name 'Ramesh'. A 'Summary' section is visible, containing 'CONTACT INFORMATION' with fields for 'Address 1: City', '*Full Name' (Ramesh), '*Last Name' (Ramesh), and 'Job Title'. To the right of the summary, there are tabs for 'POSTS' and 'ACTIVITIES'. A context menu is open on the right side of the screen, listing various actions: 'Add to Marketing List', 'Assign', 'Email a Link', 'Delete', 'Create Invitation', 'Change Password', 'Form', 'Payment', 'Recurring Billing' (highlighted with a red box), 'Process', 'Refund', 'Geo Code', and 'Share'.

RECURRING BILLING	
Subscription Interval	
Subscription Name *	MTC
Subscription Type *	Every Month ▼
Subscription Interval *	3
Subscription Duration	
Subscription Start Date	2018/01/23 
Payment Amount *	1000
Total Occurrences *	5
Trail Period	
Trail Amount	0
Trail Occurrences	
Customer Information	
Customer *	Ramesh
Email *	null
Credit Card *	Select ▼
Address Line1	null
Address Line2	null
Address Line3	null
City *	null
State/Province	null
Zip/Postal Code *	null
Country *	null

- 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.

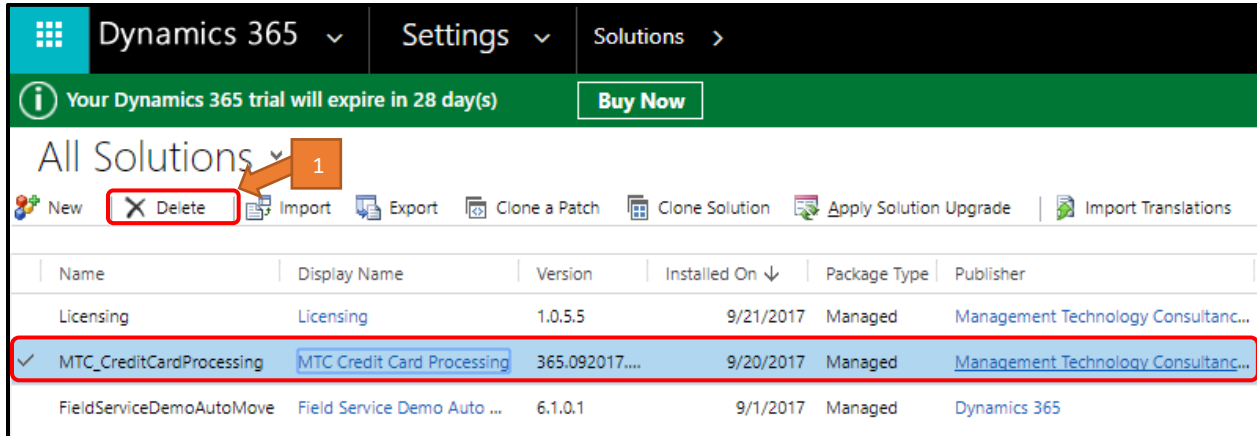
0 Hours	For Immediate processing
---------	--------------------------

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)

How to Uninstall Credit Card Processing in your Dynamics 365?

Step1:

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

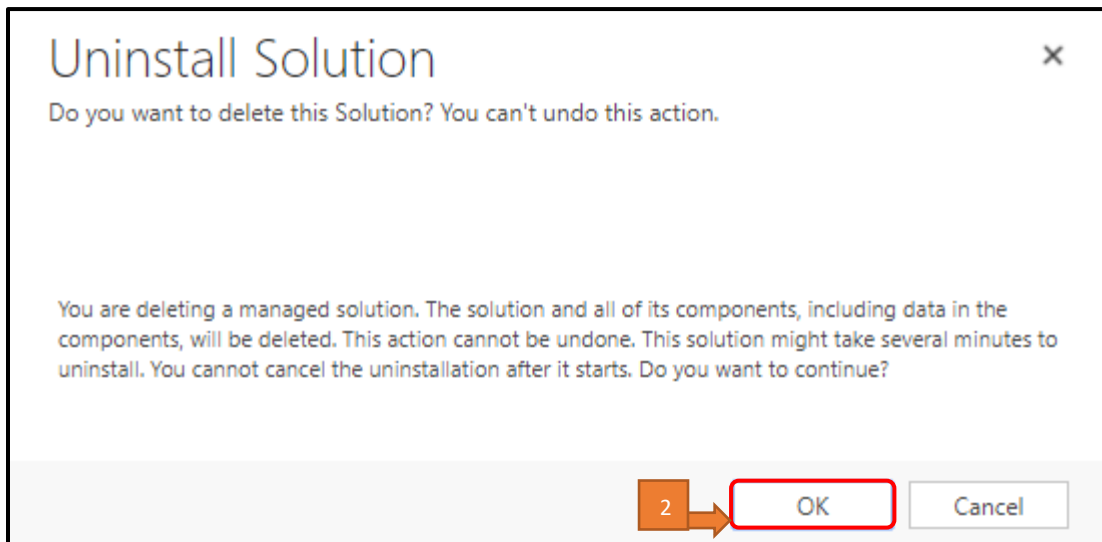


The screenshot shows the Dynamics 365 interface. At the top, there's a navigation bar with 'Dynamics 365', 'Settings', and 'Solutions'. Below this is a green banner indicating the trial will expire in 28 days. The main area is titled 'All Solutions' and contains a table of installed solutions. A red box highlights the 'Delete' button in the top toolbar, with an orange arrow pointing to it labeled '1'. Another red box highlights the 'MTC_CreditCardProcessing' solution row in the table, which is also highlighted with a blue selection bar.

Name	Display Name	Version	Installed On	Package Type	Publisher
Licensing	Licensing	1.0.5.5	9/21/2017	Managed	Management Technology Consultanc...
✓ MTC_CreditCardProcessing	MTC Credit Card Processing	365.092017....	9/20/2017	Managed	Management Technology Consultanc...
FieldServiceDemoAutoMove	Field Service Demo Auto ...	6.1.0.1	9/1/2017	Managed	Dynamics 365

Step2:

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



The screenshot shows the 'Uninstall Solution' dialog box. It contains the text: 'Do you want to delete this Solution? You can't undo this action.' Below this, a warning message states: 'You are deleting a managed solution. The solution and all of its components, including data in the components, will be deleted. This action cannot be undone. This solution might take several minutes to uninstall. You cannot cancel the uninstallation after it starts. Do you want to continue?' At the bottom, there are two buttons: 'OK' and 'Cancel'. An orange arrow labeled '2' points to the 'OK' button, which is also highlighted with a red box.