



Microsoft Dynamics CRM / XRM Platform



User Guide



CRM Versions Supported : CRM 2011 and Online

In association with Authorize.net the process of capturing Credit Card Details with high security made possible in Microsoft Dynamics CRM 2011. Processing credit card payment made easy, simple. The credit card details store in CRM are encrypted to avoid any misuse of data.

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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 2011. Processing credit card payment made easy, simple. The credit card details store in CRM are encrypted to avoid any misuse of data. The merchants can fulfill and complete the process of Sales cycle with ease.

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License Key

- ➔ To install Order Credit Card for Microsoft CRM, you require a License Key, which you can get by sending an E-mail request to **salesteam@mtccrm.com** with your Organization Unique Name.
- ➔ To access your Organization Unique Name Click on **settings**→**Customizations**→**Developer resources** as shown

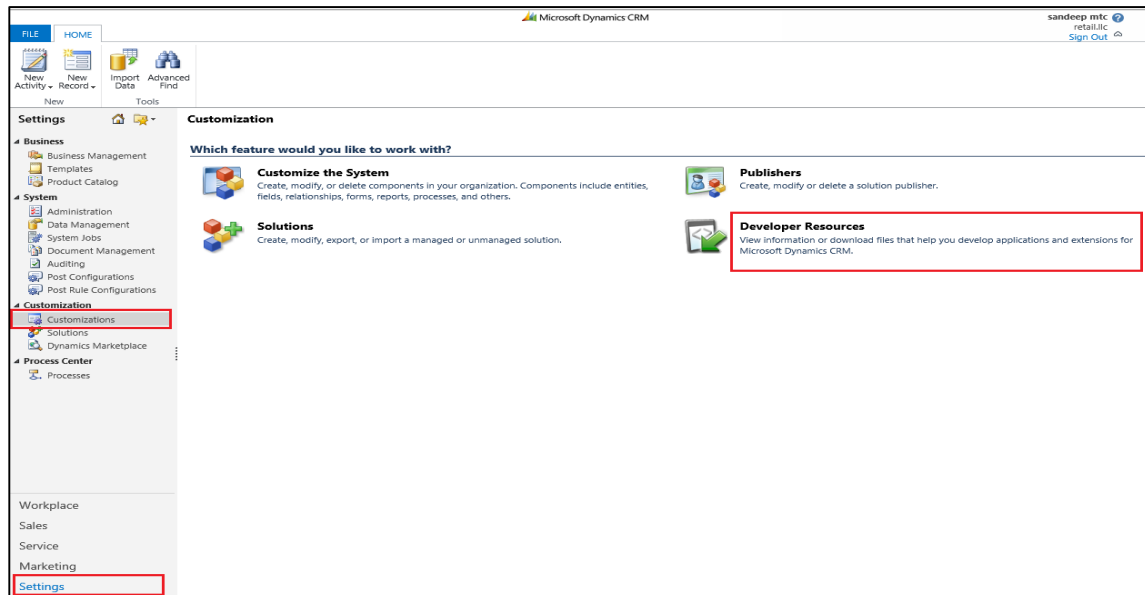


Figure 1: Developer Resources

- ➔ Send this Organization Unique Name through Email and you will receive your Licensing Key within 24 hours.



Figure 2: Org Name Information

Installation Process

Initially you have to import the Licensing Solution and then the MTC_CreditCard Processing managed files in to the CRM. To install the Order Credit Card for Microsoft CRM the following steps have to be followed

STEP 1:

- ➡ For free trial go to <http://www.dynamicsexchange.com/CC.aspx> click on Download Order Credit Card Solution.

STEP 2:

- ➡ Save the zip files in a folder
- ➡ Extract the files from the downloaded folder. You will get two WINRAR ZIP files.



Licensing_1_0_3_0_managed.zip



MTC_CreditCardProcessing_1_0_0_1_managed.zip

STEP 3:

- ➡ To import the solution Open your CRM click on **settings** → **solution** → **import** it will open import Solution window.

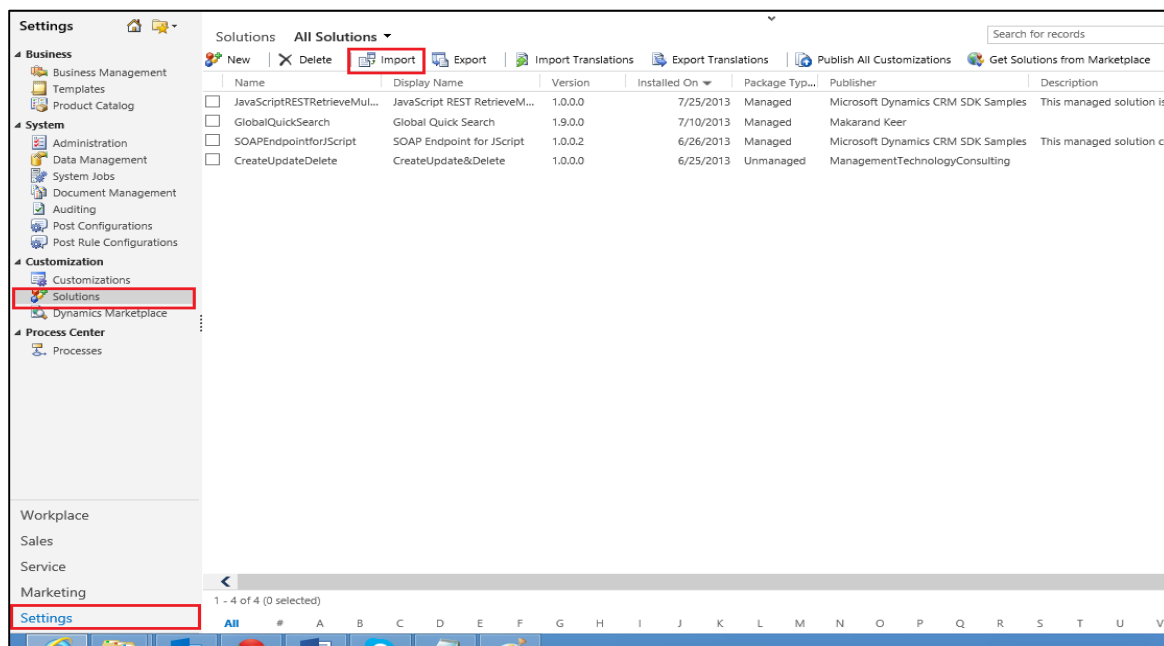


Figure 3: Import Solution

Installing Licensing Solution

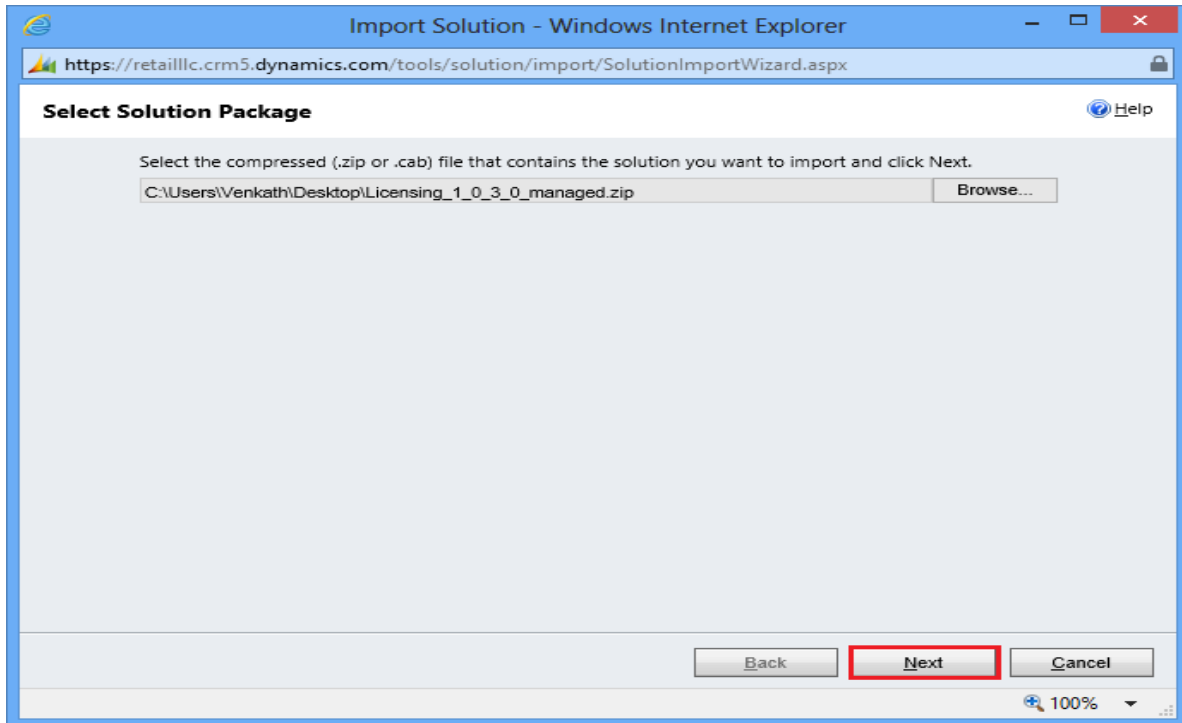
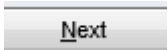


Figure 4: Select Solution Package

- ➡ In Import Solution Window you can browse and Select Solution Package zip file and then click on  for further processing.

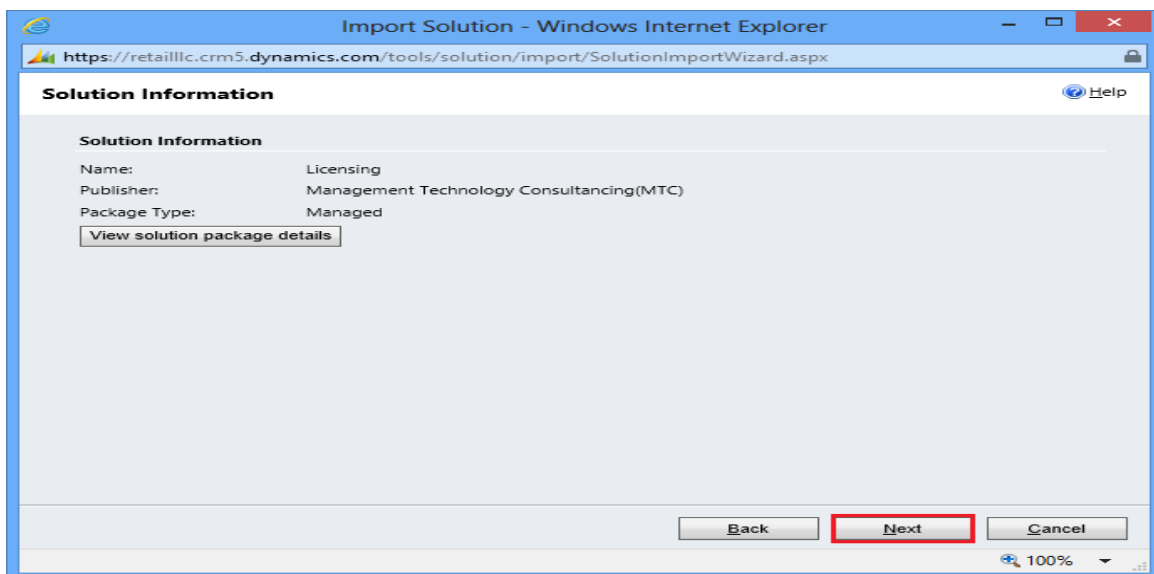
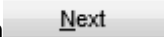


Figure 5: Solution Information

- ➡ Click on  to proceed

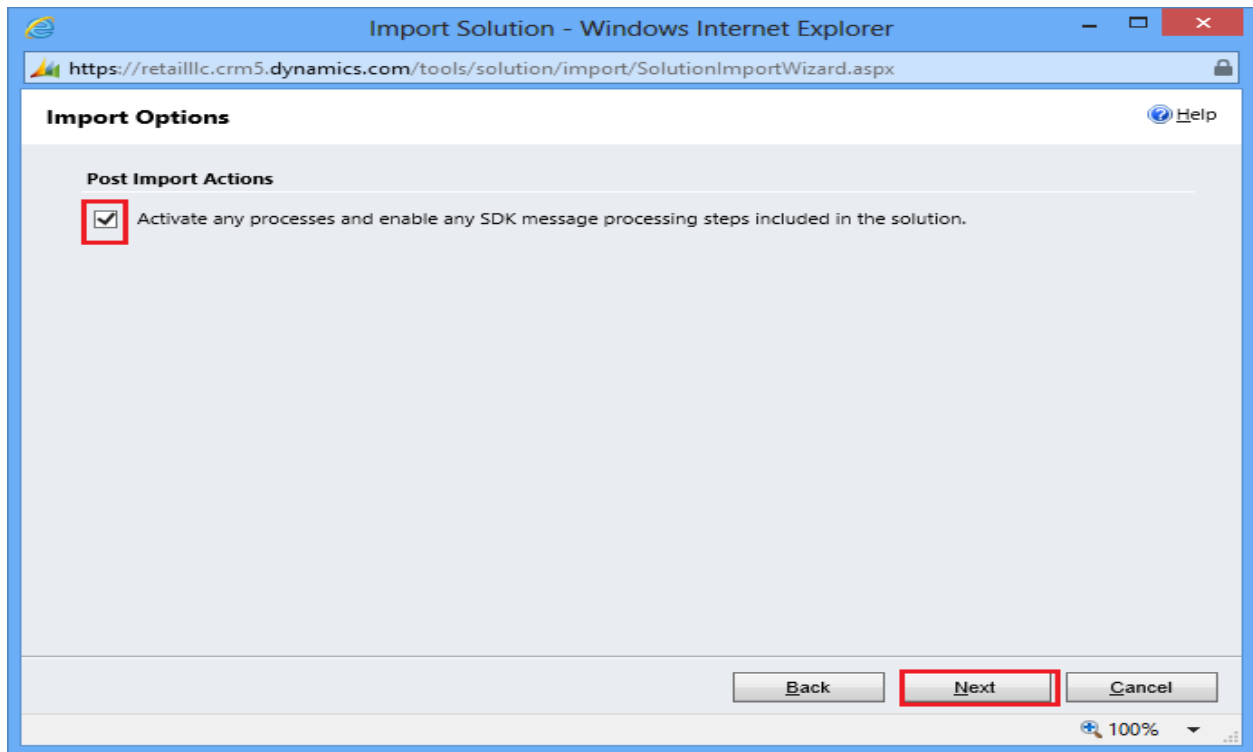
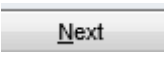
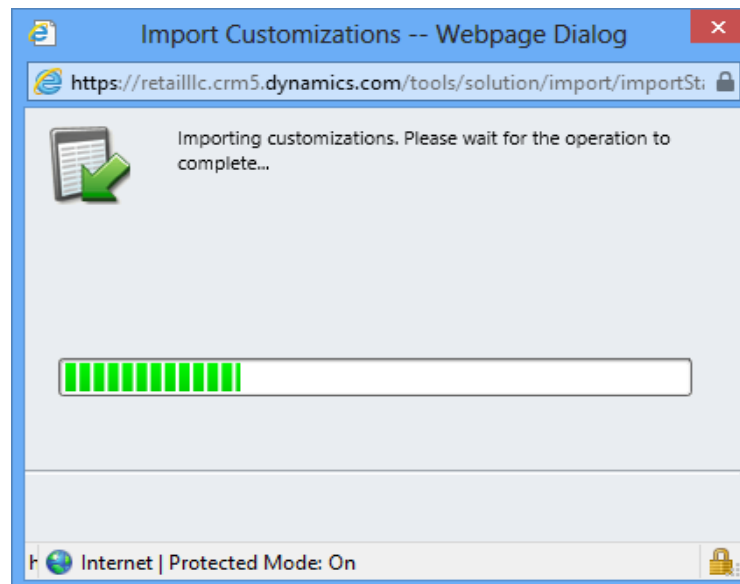


Figure 6: Import Option

➡ Click on  to proceed



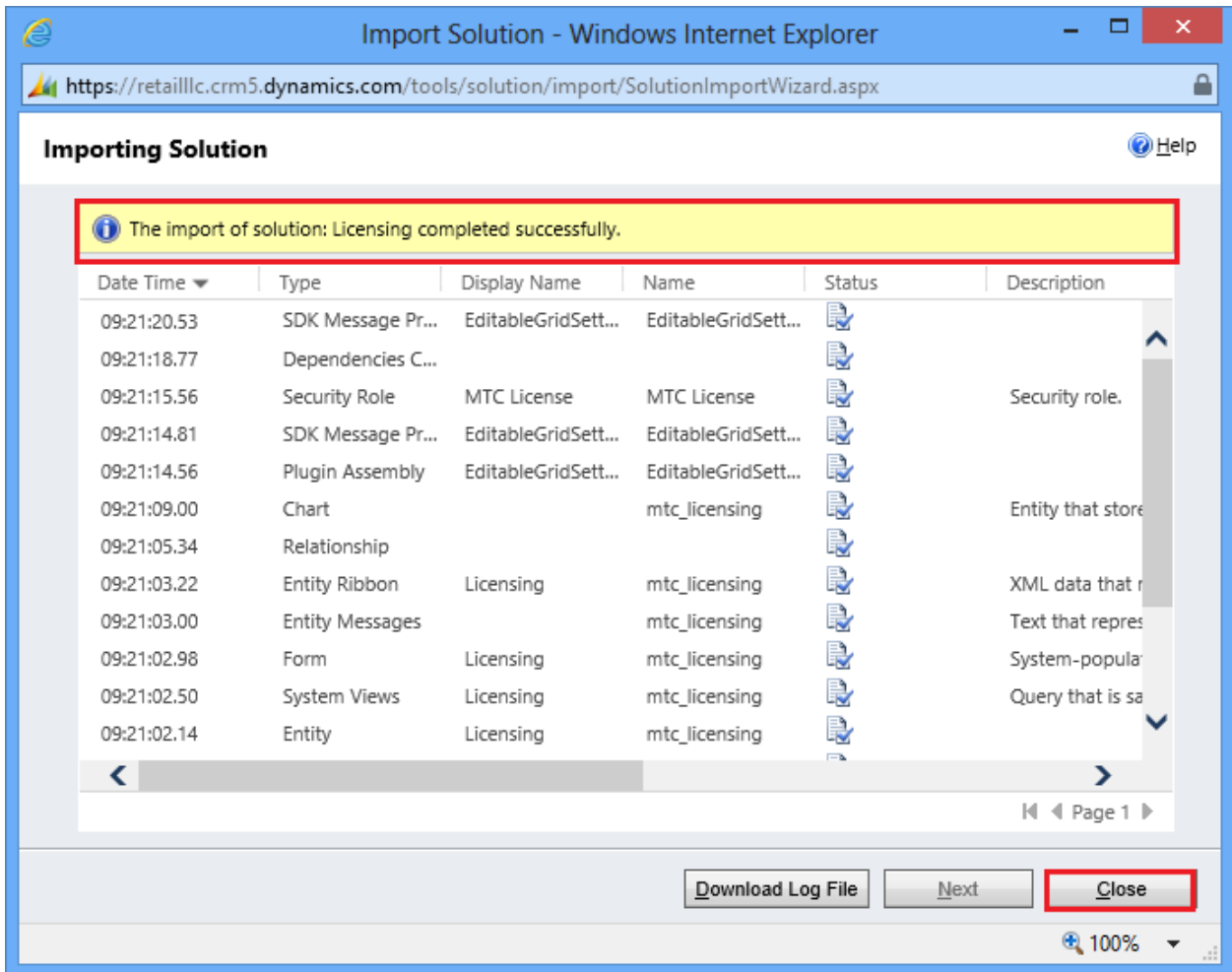
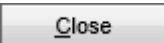


Figure 7: Importing Solution - Licensing

- Click on  after successful completion message is displayed.

Installing Credit Card Processing Solution

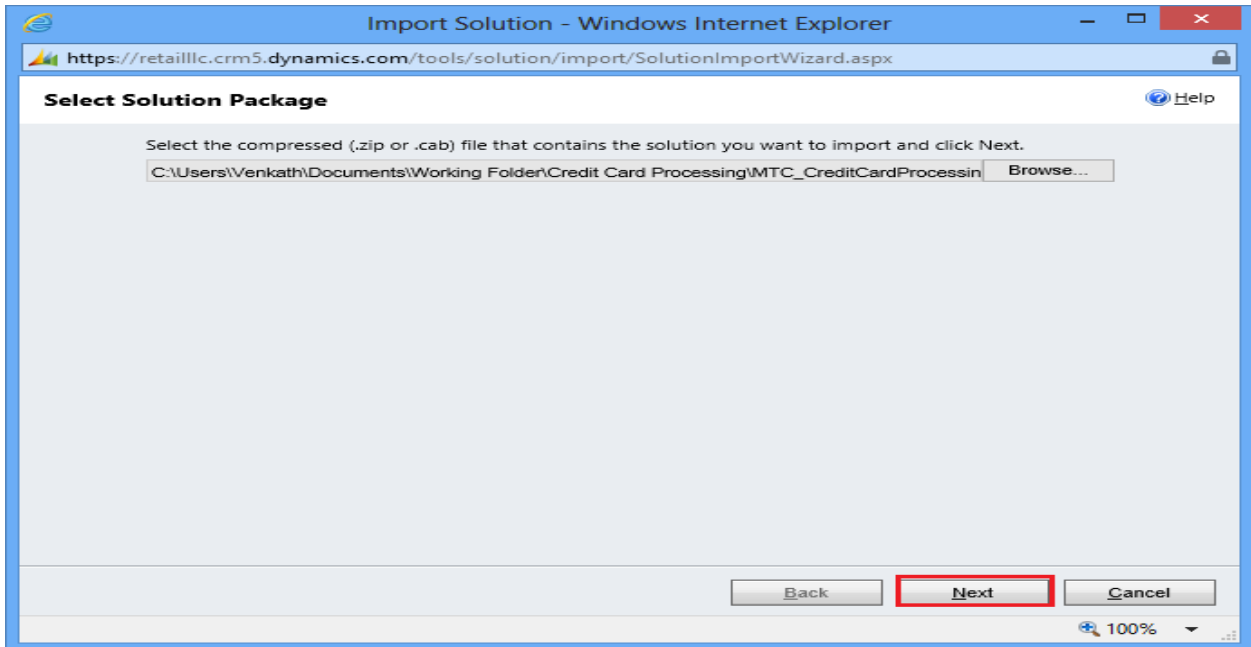



Figure 8: Select Solution Package – Credit Card

➡ Click on  to proceed.

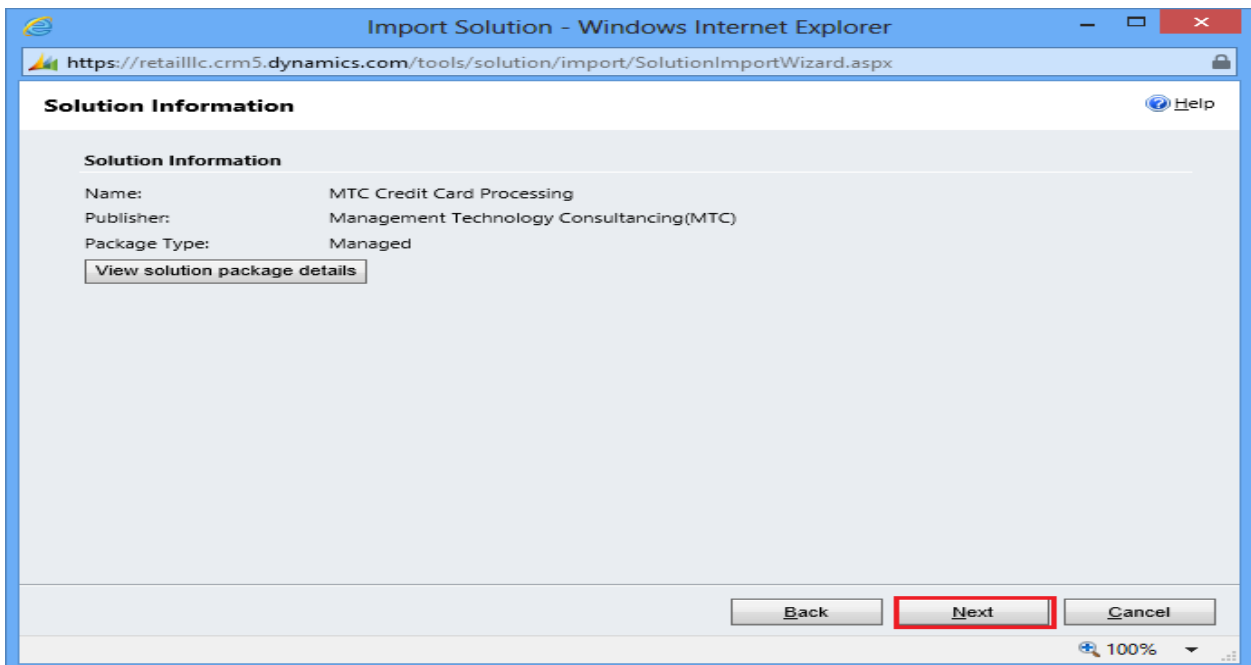
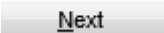


Figure 9: Solution Information

➡ Click on  to proceed.

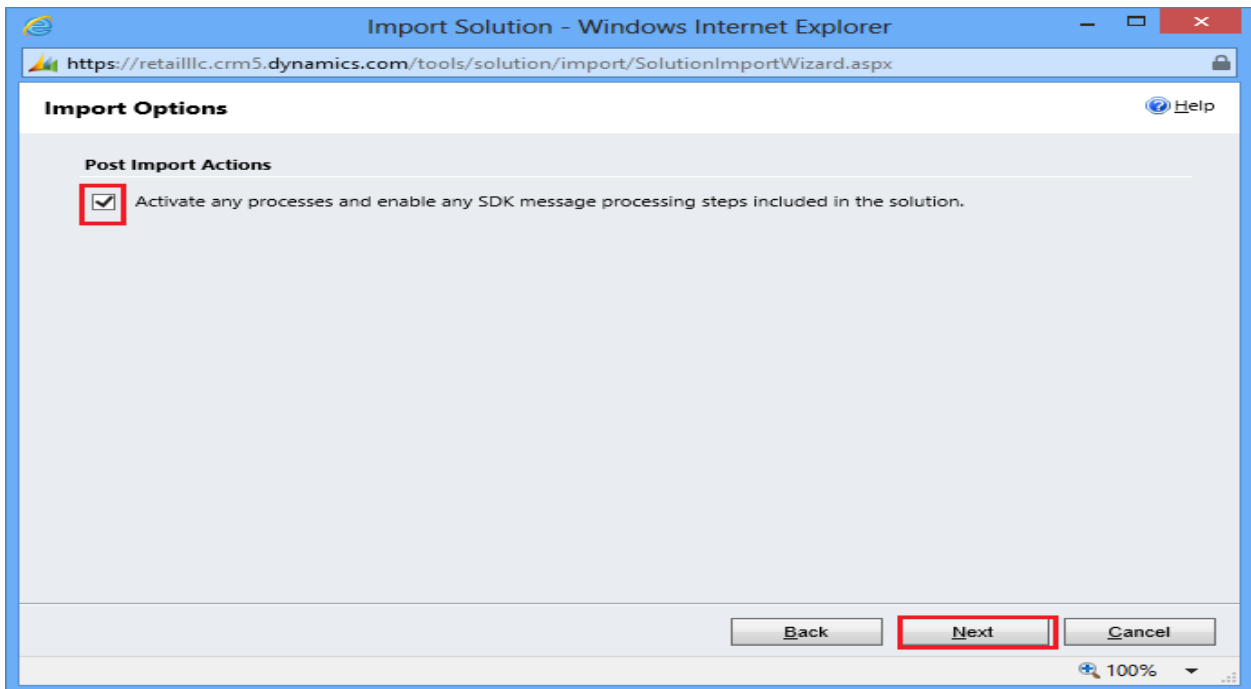
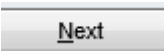
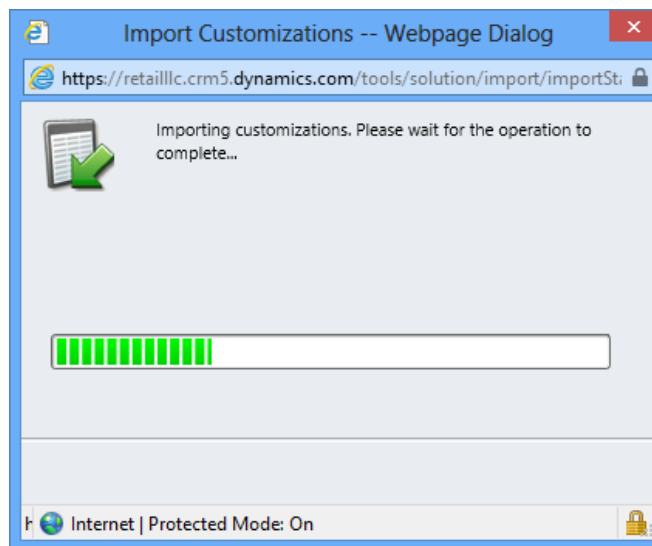


Figure 10: Import Option – credit card

➡ Click on  to proceed.



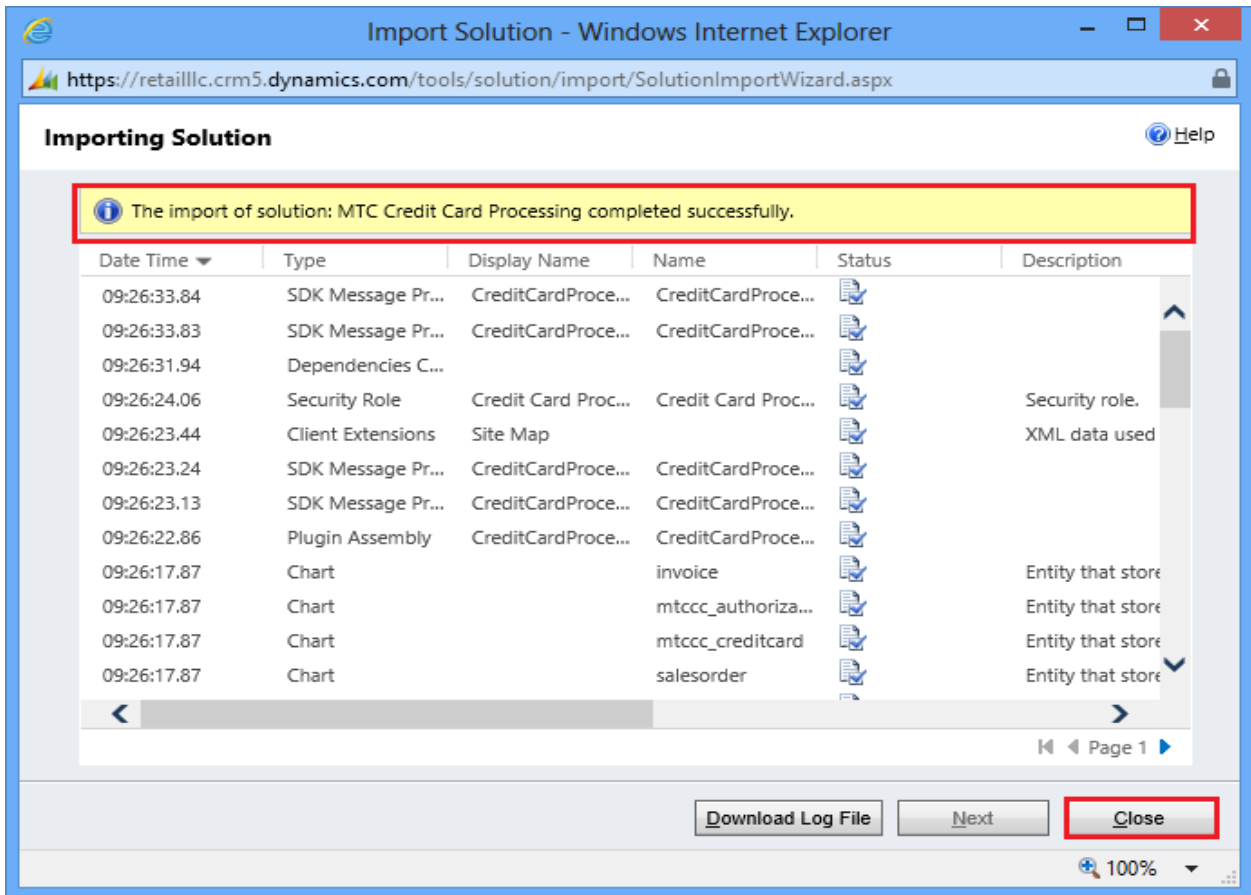
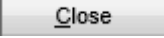


Figure 11: Importing Solution - Credit Card

➡ Click on  after successful completion message is displayed.

Placing License Key

➡ CRM->Settings->Solutions-> double click on MTC_CreditCardProcessing

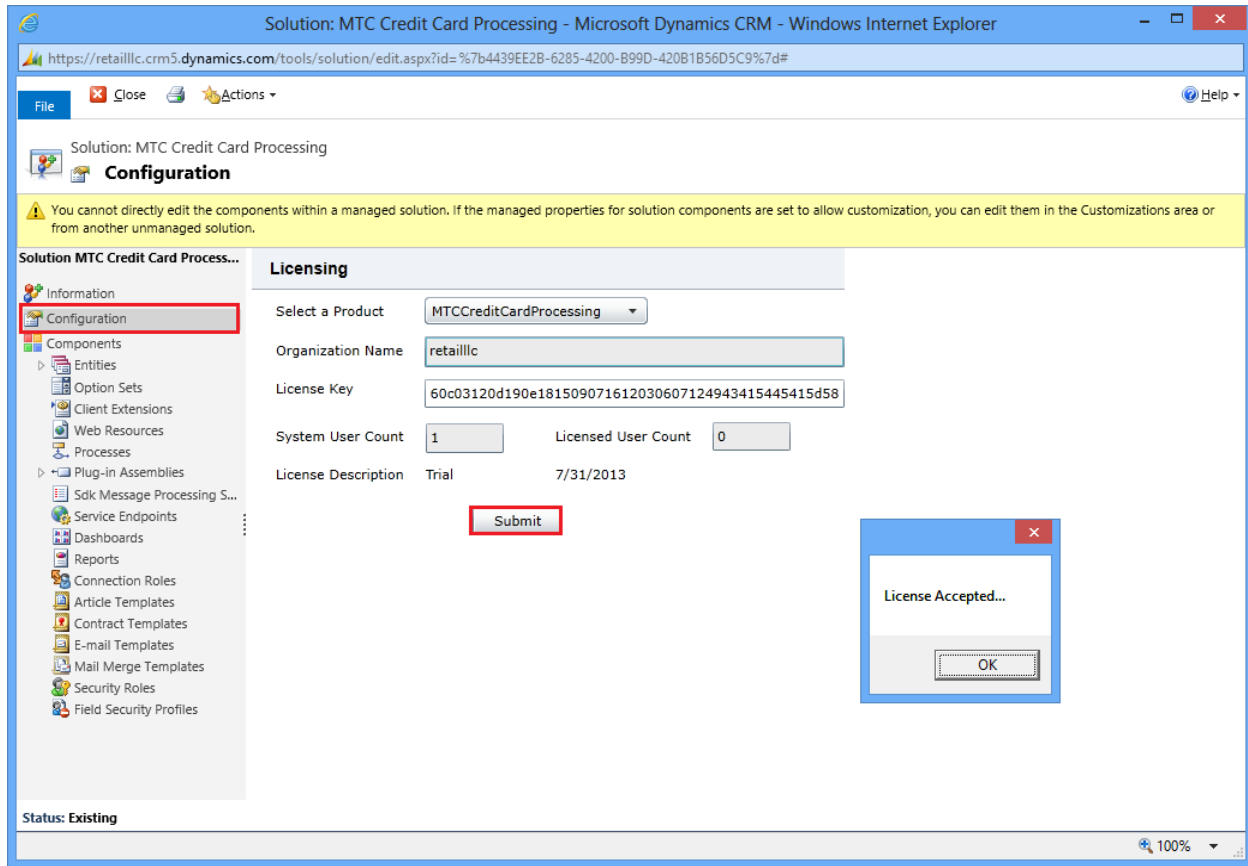


Figure 12: License Key for Credit Card

- Select Product as **MTCCreditCardProcessing**,
- Copy & Paste the License key which you have received from salesteam@mtccrm.com
- Click on **Submit**
- A pop up window appears and displays the message as **License Accepted**. Click on **OK**.

Register with Authorize.net

The user has to register with Authorize.net a gateway solution. Firstly get **API Login code** and **API Transaction Key**. Unless these codes are obtained from Authorize.net the user cannot process the credit card processing.

- Log on to <http://www.authorize.net/> and login to Merchant Account or directly login to <https://account.authorize.net/>

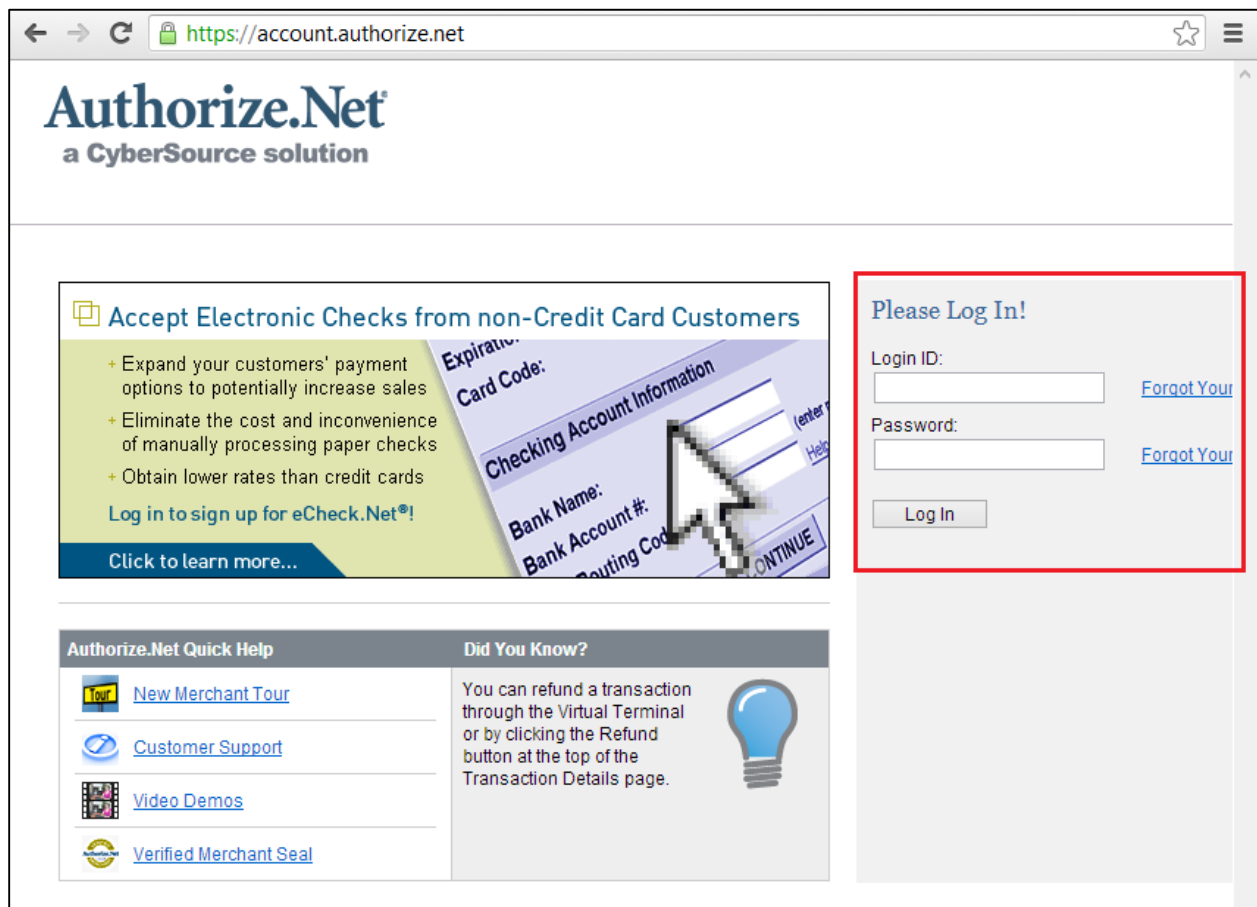



Figure 13: Authorize.net Merchant Login Screen

- Prove the Login ID and Password to enter Authorize.net.
- Click on Account as shown below



[FEEDBACK](#)
[CONTACT US](#)
[HELP](#)
[LOG OUT](#)

Welcome: TestFirstName TestLastName

[HOME](#)
[TOOLS](#)
[REPORTS](#)
[SEARCH](#)
[ACCOUNT](#)

Virtual Terminal | Unsettled Transactions

ANNOUNCEMENTS

5/17/13
Exclusive Discount on Your Internet Retailer Registration

5/9/13
New Partners Added to the Merchant Toolbox

5/9/13
Authorize.Net Receives ACE Award for Customer Support

TOOLS

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

REPORTS


Transaction Detail
Transaction Statistics
Returns
Notice of Change

SEARCH

Search by Batch
Search by Business Day
Unsettled Transactions
Suspicious Transactions

ACCOUNT


Settings
Billing Information
Statements
User Administration
User Profile
Alternative Payments



Authorize.Net Support Center


The Authorize.Net Support Center, located at <https://support.authorize.net/>, provides comprehensive answers to virtually any customer support question, as well as useful links to [video demos](#), help files and information on contacting us. We strongly recommend using the Support Center anytime you need help.

PRODUCTS & SERVICES




eCheck.Net®

Offer your customers an additional payment option. eCheck.Net enables you to accept and process electronic check payments directly from your website, Virtual Terminal or Batch Upload.




Automated Recurring Billing™ (ARB)

ARB enables you to create "subscriptions" for recurring billings. Simply enter the customer's payment information, billing amount, and a specific billing interval and duration. ARB automatically generates the subsequent recurring transactions for you!



Advanced Fraud Detection Suite™ (AFDS)


The Advanced Fraud Detection Suite safeguards your account using powerful transaction filters and IP address tools to identify and prevent suspicious transactions. Flexible settings allow you to customize the transaction filters to meet your unique business needs.



Customer Information Manager (CIM)

CIM allows you to store your customers' sensitive payment information on our secure servers, simplifying payments for returning customers and recurring transactions. It can also help you comply with the Payment Card Industry (PCI) Data Security Standard, since customer data is no longer stored locally.

THIRD-PARTY SOLUTION



Merchant Toolbox

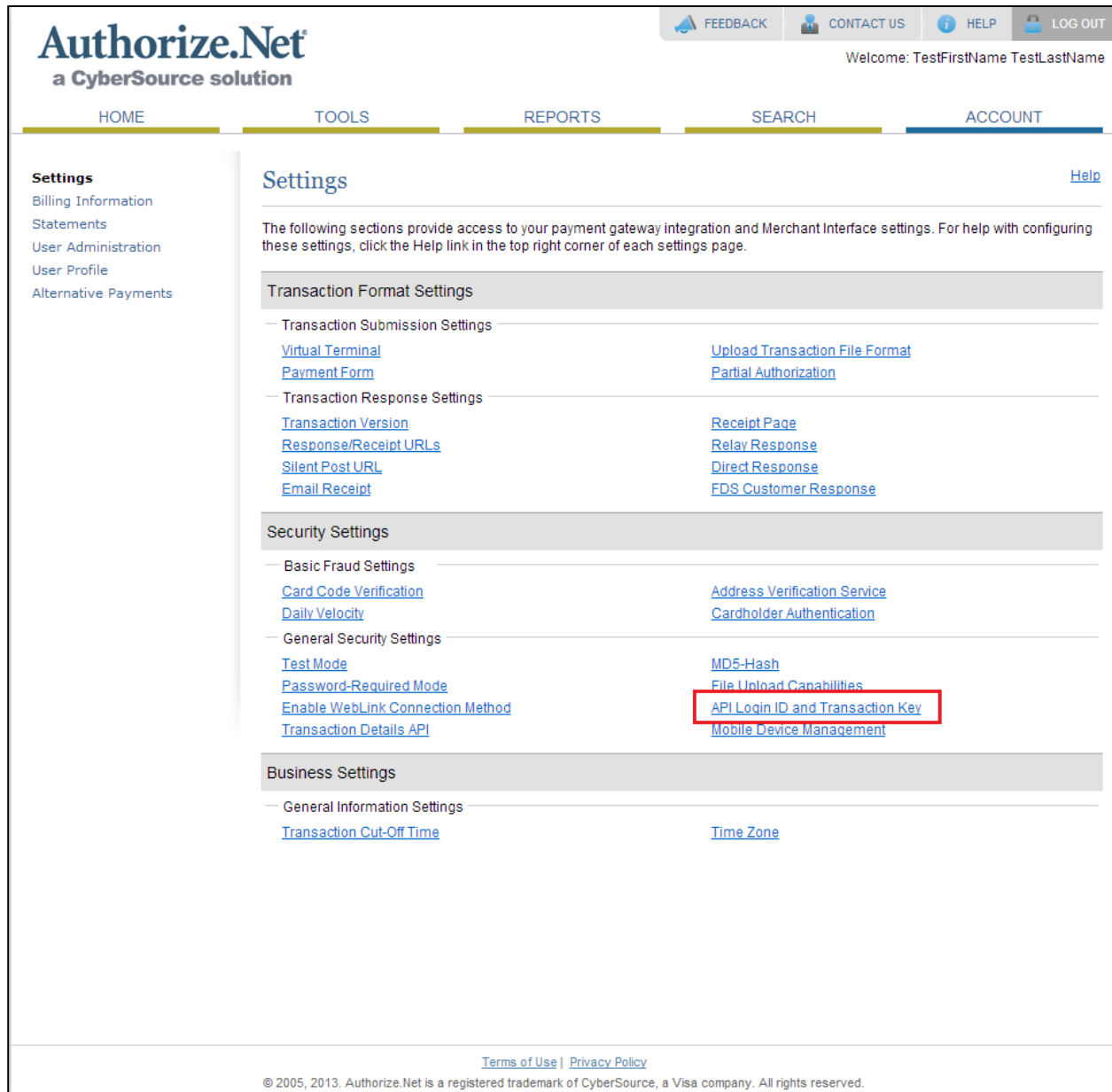
The Merchant Toolbox is designed to provide you with best-of-class solutions to help you better manage key areas of your business. Categories include marketing, security, accounting and business productivity. Many vendors in the Merchant Toolbox offer special discounts or other incentives exclusively to Authorize.Net merchants. Whether you're looking for help marketing your company, identifying and preventing fraudulent transactions or updating your bookkeeping, the Merchant Toolbox can help you find solutions that meet your specific business needs. We often add new partners, so be sure to check back regularly.

[Terms of Use](#) | [Privacy Policy](#)

© 2005, 2013. Authorize.Net is a registered trademark of CyberSource, a Visa company. All rights reserved.

Figure 14: Authorize.net - Select Account

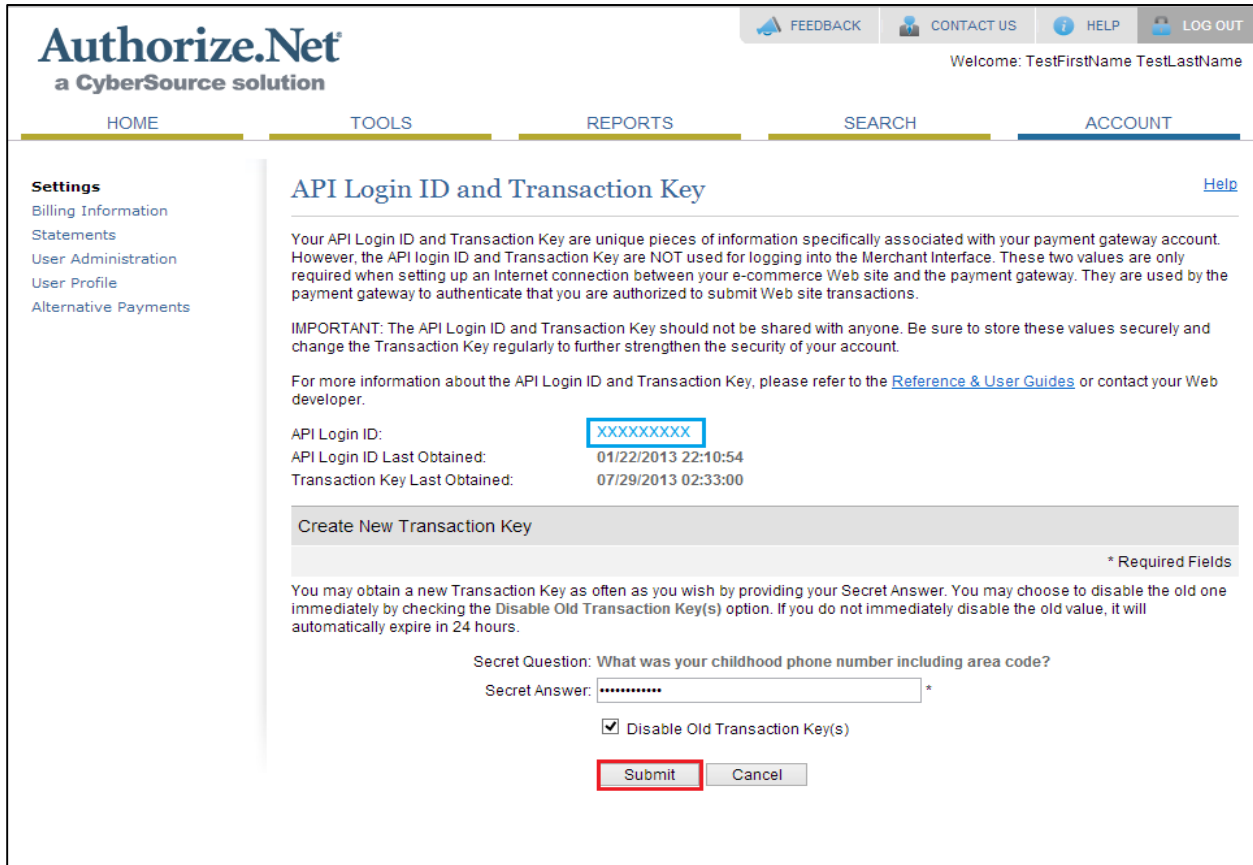
- One the Setting screen is opened click on API Login ID and Transaction key as shown below



The screenshot shows the Authorize.Net account settings page. The left sidebar contains a 'Settings' menu with options like Billing Information, Statements, User Administration, User Profile, and Alternative Payments. The main content area is titled 'Settings' and includes a 'Help' link. Below this, there are sections for Transaction Format Settings, Security Settings, and Business Settings. The 'Security Settings' section contains a list of links, including 'API Login ID and Transaction Key', which is highlighted with a red rectangular box. Other links in this section include 'Card Code Verification', 'Daily Velocity', 'General Security Settings', 'Test Mode', 'Password-Required Mode', 'Enable WebLink Connection Method', 'Transaction Details API', 'Address Verification Service', 'Cardholder Authentication', 'MD5-Hash', 'File Upload Capabilities', and 'Mobile Device Management'.

Figure 15: Authorise.net – Select API Login and Transaction Key

- API login ID is shown against its column along the other details like Login ID last Obtained and Transaction Key last obtained.



Authorize.Net
a CyberSource solution

FEEDBACK CONTACT US HELP LOG OUT

Welcome: TestFirstName TestLastName

HOME TOOLS REPORTS SEARCH ACCOUNT

Settings
Billing Information
Statements
User Administration
User Profile
Alternative Payments

API Login ID and Transaction Key [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.

IMPORTANT: The API Login ID and Transaction 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 and Transaction Key, please refer to the [Reference & User Guides](#) or contact your Web developer.

API Login ID: XXXXXXXXXX
 API Login ID Last Obtained: 01/22/2013 22:10:54
 Transaction Key Last Obtained: 07/29/2013 02:33:00

Create New Transaction Key

* Required Fields

You may obtain a new Transaction 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(s) option. If you do not immediately disable the old value, it will automatically expire in 24 hours.

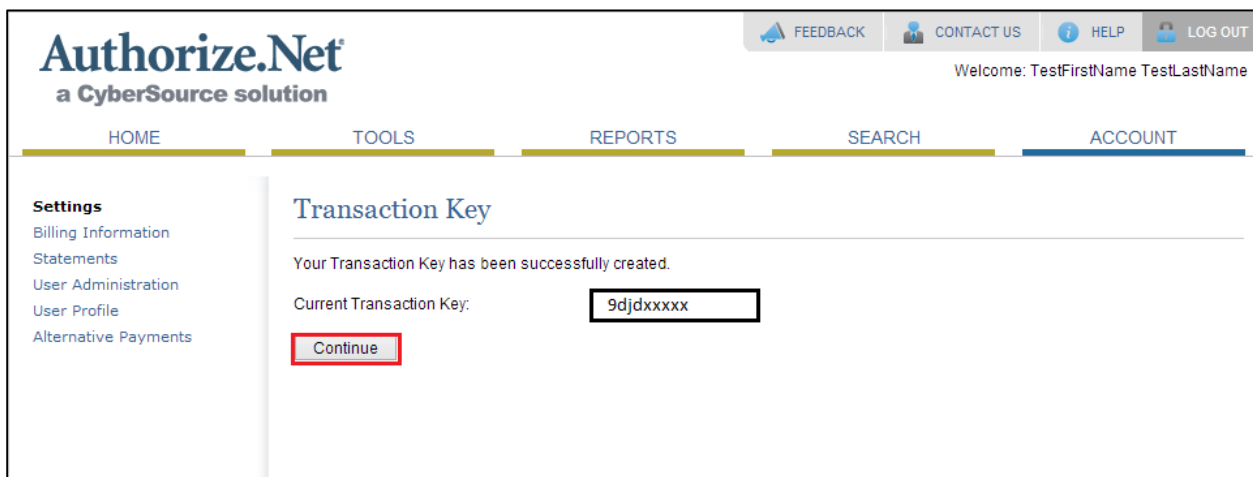
Secret Question: What was your childhood phone number including area code?
 Secret Answer:

☒ Disable Old Transaction Key(s)

Submit Cancel

Figure 16: API Login and Transaction Key

- Create New Transaction Key by following the Procedure and click submit button to generate a new Transaction Key as shown below



Authorize.Net
a CyberSource solution

FEEDBACK CONTACT US HELP LOG OUT

Welcome: TestFirstName TestLastName

HOME TOOLS REPORTS SEARCH ACCOUNT

Settings
Billing Information
Statements
User Administration
User Profile
Alternative Payments

Transaction Key

Your Transaction Key has been successfully created.

Current Transaction Key: 9djdxxxx

Continue

Figure 17: Transaction Key - Authorize.net

- Click on Continue
- Store and Record API Login ID and Transaction Key details
- Now Go to **CRM->Settings->Credit Card Processing->Authorizations**

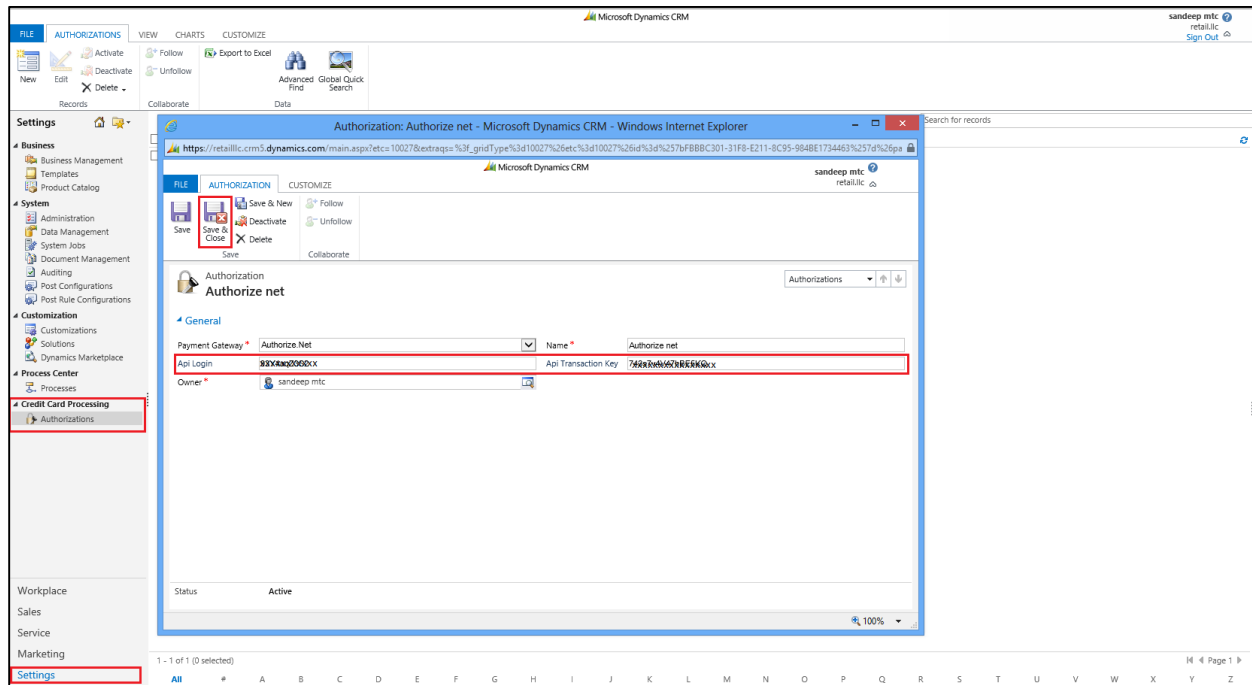


Figure 18: CRM screen - Storing API Login details

- Copy the API Login and API Transaction Key click on Save & Close to continue

Procedure to add Credit Card to customer

Once the record is saved, the credit card number is masked and the ccv value is removed from the form. These values are also masked within the Customer Information Management interface. These values will not touch the CRM database to ensure PCI compliance.

- Go to **CRM->Workplace->Customer-> either Accounts or Contacts**
- Select Accounts and click to open or Select a New Account

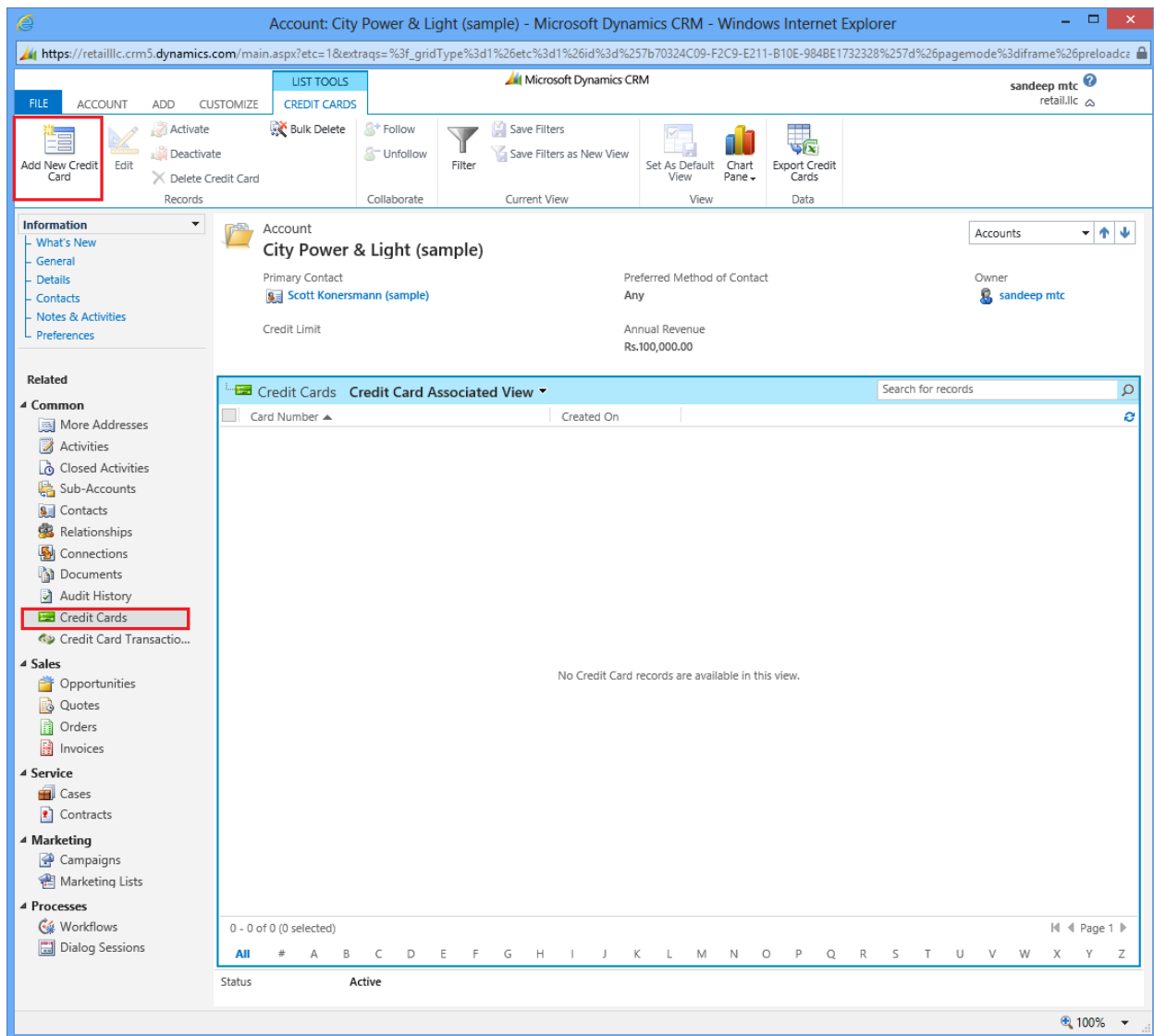


Figure 19: CRM Account showing Credit Card view

- Click on Credit Cards on the left panel as shown above
- Select Add New Credit Card button on the top ribbon as shown above

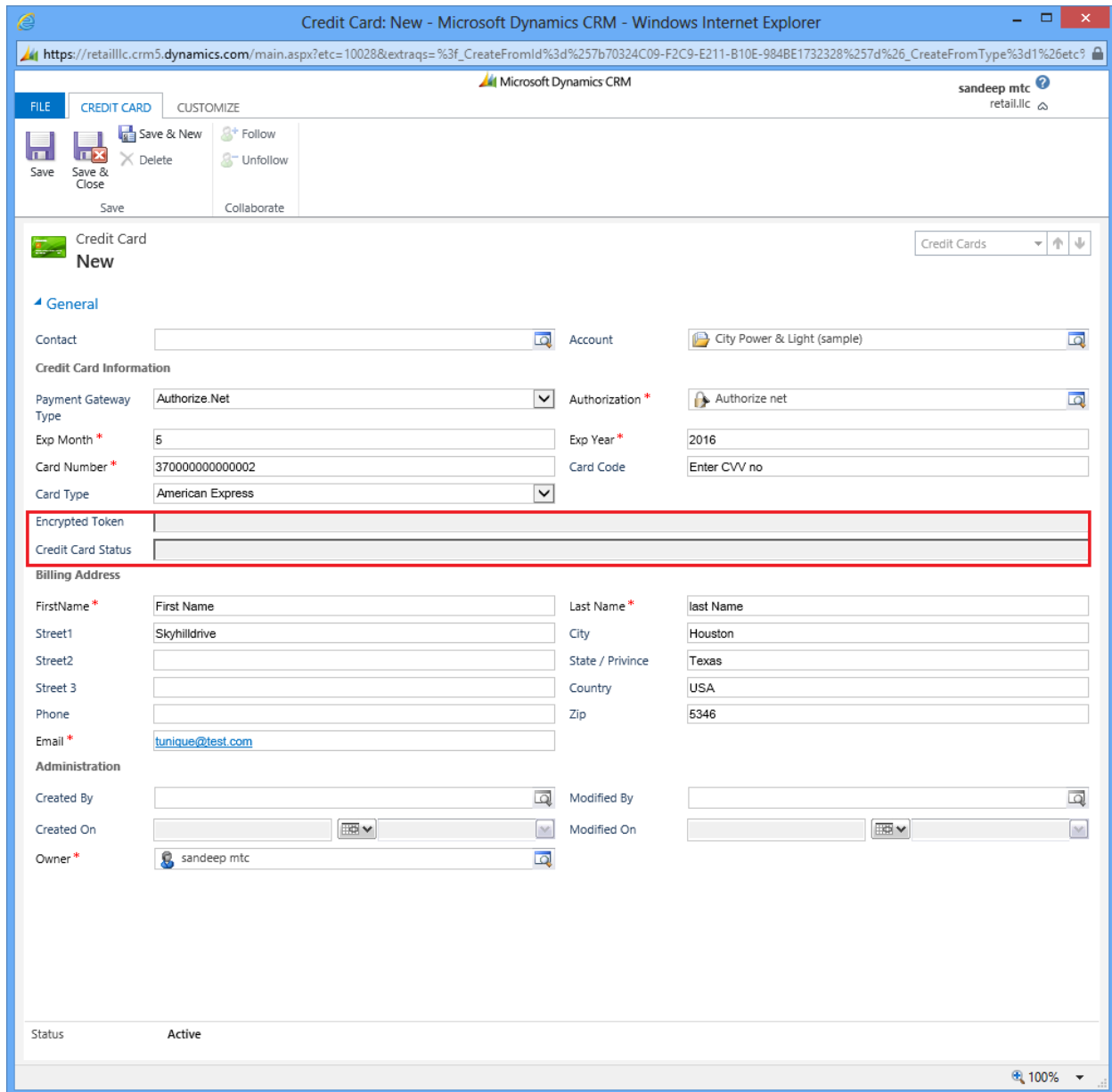
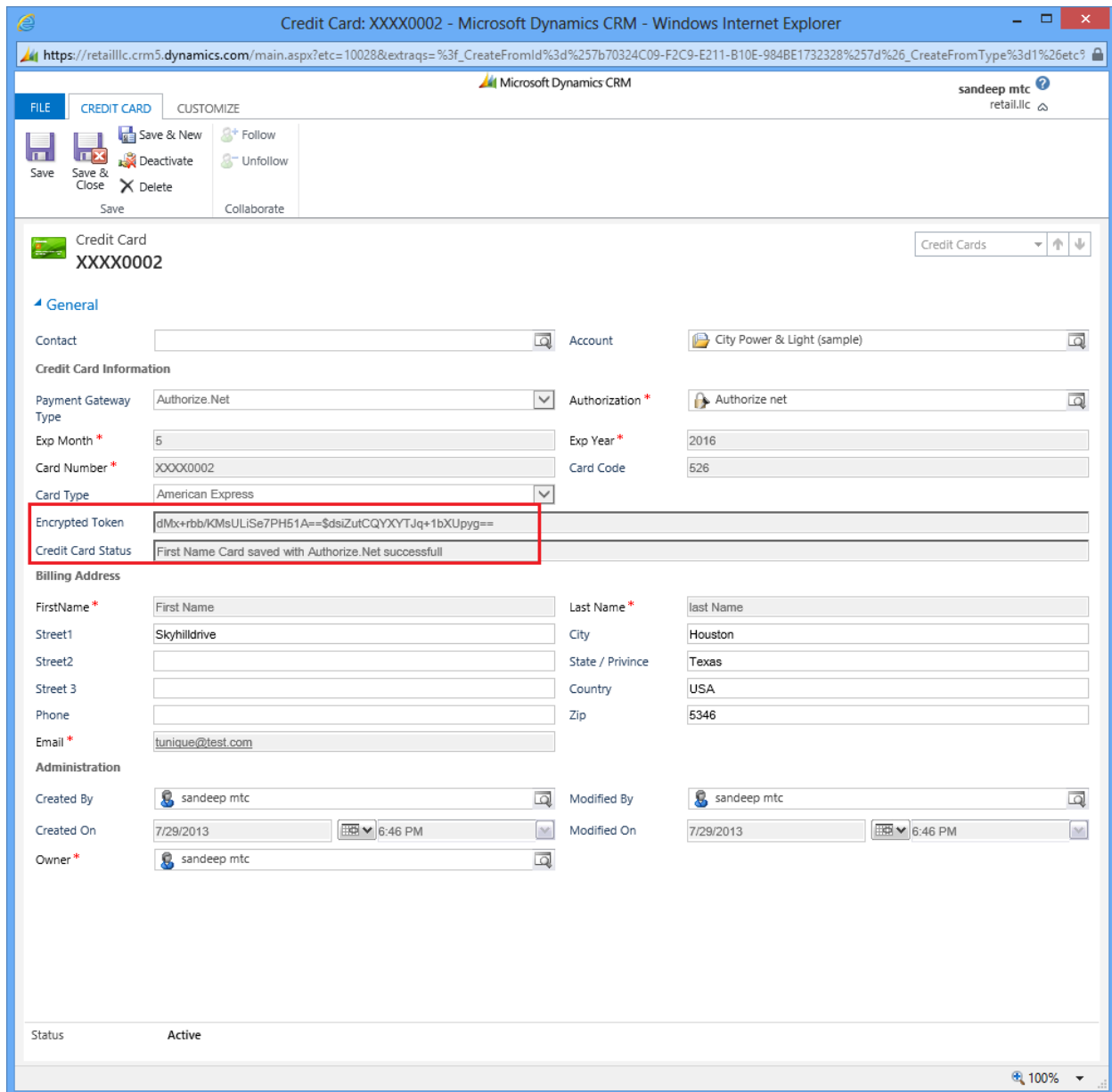


Figure 20: New Credit Card form with details

- 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 in the credit card information and the billing information, (The fields marked with a * are required) then choose a Payment Gateway to store the card with.
- **Note: If you would like to have this credit card stored under a contact or an account, specify an account and/or a contact.**

- The email address, Parent Account, and Contact will be listed in the Payment Profile along with the name on the credit card. This allows for easy searching within the Customer Information Management interface
- Click on Save. You will know the credit card saved successfully because an encryption token and a credit card status will be passed back to you with a “SUCCESSFUL” message of some sort. Close the window.
- You can see the Encrypted card information is stored in the CRM as shown below



The screenshot shows the Microsoft Dynamics CRM interface for a Credit Card record. The record ID is XXXX0002. The form is divided into several sections: General, Credit Card Information, Billing Address, and Administration. The Credit Card Information section contains fields for Payment Gateway Type (Authorize.Net), Exp Month (5), Exp Year (2016), Card Number (XXXX0002), Card Code (526), and Card Type (American Express). The Encrypted Token field is highlighted with a red box and contains the value: dMx+rbb/KMsULiSe7PH51A==\$dsiZutCQYXYTJq+1bXUpyg==. The Credit Card Status field contains the message: First Name Card saved with Authorize.Net successfull. The Billing Address section contains fields for First Name, Last Name, Street1, Street2, Street3, Phone, and Email. The Administration section contains fields for Created By, Created On, Owner, Modified By, and Modified On.

Field	Value
Contact	
Account	City Power & Light (sample)
Payment Gateway Type	Authorize.Net
Exp Month *	5
Exp Year *	2016
Card Number *	XXXX0002
Card Code	526
Card Type	American Express
Encrypted Token	dMx+rbb/KMsULiSe7PH51A==\$dsiZutCQYXYTJq+1bXUpyg==
Credit Card Status	First Name Card saved with Authorize.Net successfull
Billing Address	
First Name *	First Name
Last Name *	last Name
Street1	Skyhilldrive
City	Houston
State / Province	Texas
Country	USA
Zip	5346
Phone	
Email *	tunique@test.com
Created By	sandeep mtc
Modified By	sandeep mtc
Created On	7/29/2013 6:46 PM
Modified On	7/29/2013 6:46 PM
Owner *	sandeep mtc
Status	Active

Figure 21: Encrypted values stored in CRM

Credit Card Processing

- Go to CRM->Workplace->Customer-> Accounts->Credit Card Transaction
- Click on Add New Credit Card Transaction as shown below

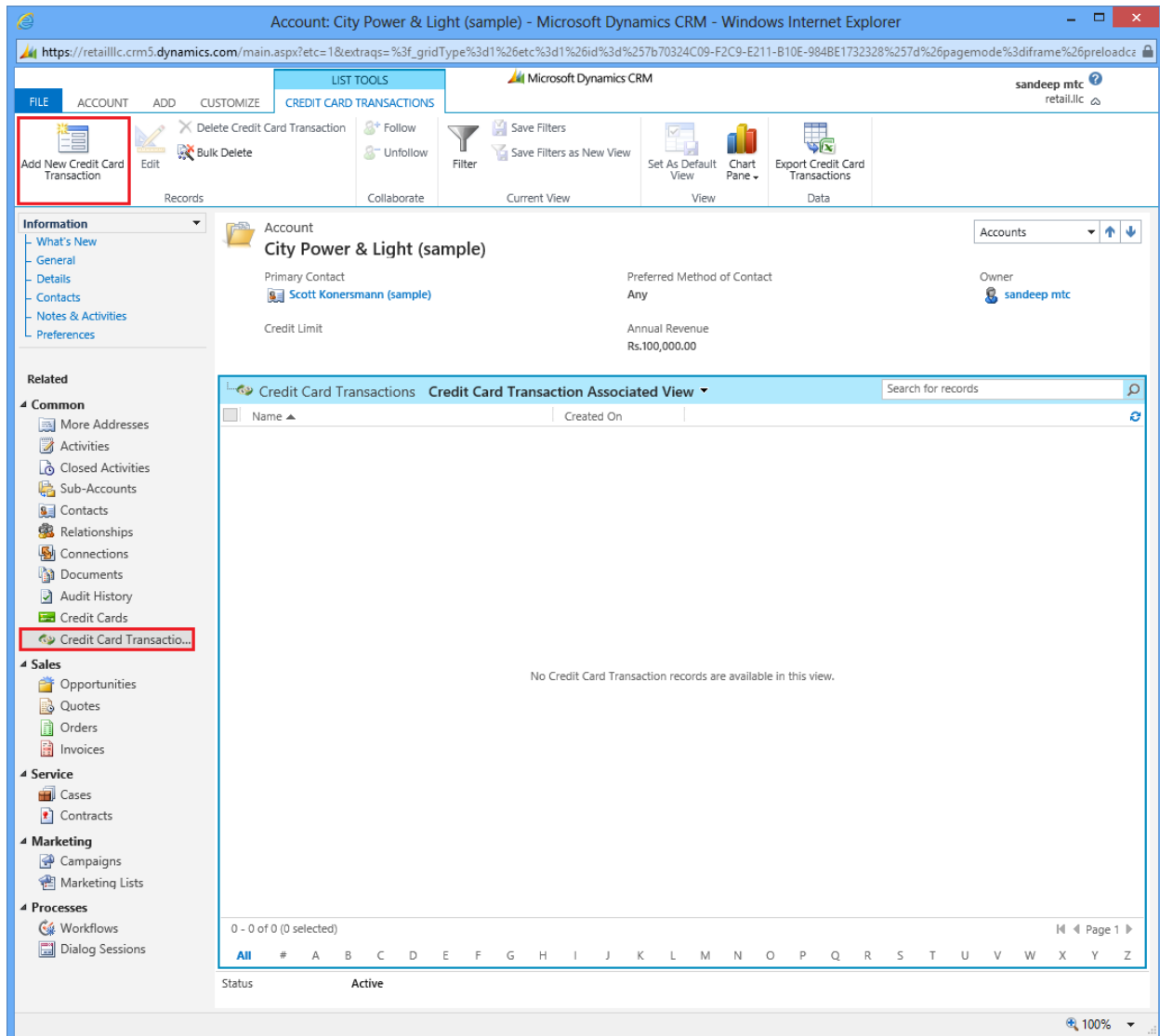
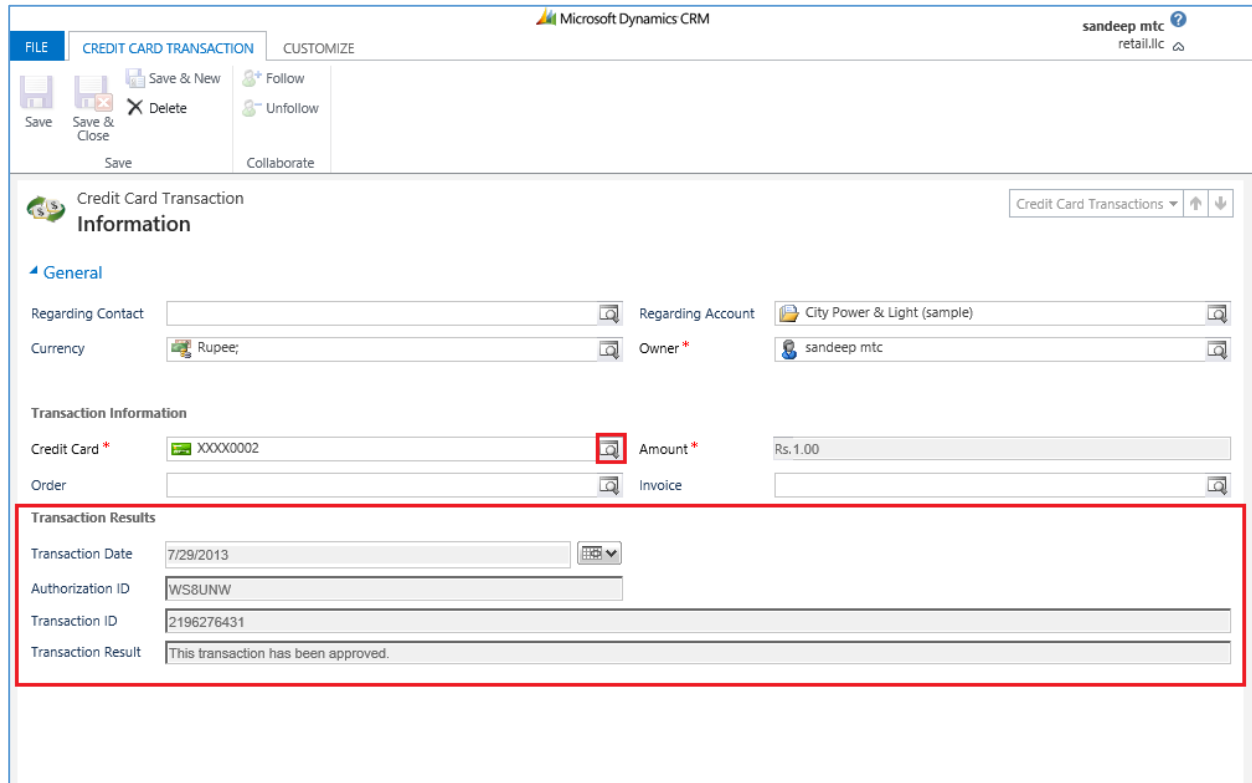


Figure 22: Select to enter Credit Card details in CRM for Account

- Account or Contact name is loaded on select along with currency
- Select the Credit Card from the list provided from Look up screen
- Enter the Amount
- The Transaction Details are empty at this stage

- Click on Save button on the ribbon placed on top left corner
- The Transaction Results are updated once the processing is done at the gateway
- Transaction Date, Authorization ID, Transaction ID and Transaction Result are displayed
- The Transaction details are updated and the result is updated as **“The transaction has been approved”** (only if the transaction passes thru the payment gateway)



The screenshot shows the Microsoft Dynamics CRM interface for a Credit Card Transaction. The ribbon at the top includes 'FILE', 'CREDIT CARD TRANSACTION', and 'CUSTOMIZE'. The 'CREDIT CARD TRANSACTION' ribbon has buttons for 'Save', 'Save & Close', 'Delete', 'Save & New', 'Follow', 'Unfollow', and 'Collaborate'. The main form area is titled 'Credit Card Transaction Information' and includes a 'General' tab. The 'General' tab contains fields for 'Regarding Contact', 'Regarding Account' (City Power & Light (sample)), 'Currency' (Rupee;), 'Owner' (sandeep mtc), 'Transaction Information', 'Credit Card' (XXXX0002), 'Amount' (Rs. 1.00), 'Order', and 'Invoice'. The 'Transaction Results' section is highlighted with a red box and contains the following data:

Transaction Results	
Transaction Date	7/29/2013
Authorization ID	WS8UNW
Transaction ID	2196276431
Transaction Result	This transaction has been approved.

Figure 23: Showing Approved Transaction

Credit Card Processing from Invoice

- Go to CRM->Sales->Invoice ->Select the desired Invoice to open

The screenshot displays the Microsoft Dynamics CRM interface. On the left, the 'Sales' menu is open, and 'Invoices' is selected. The main window shows the 'Invoice: test account invoice' form. The 'Credit Card' button on the 'INVOICE' ribbon is highlighted with a red box. The form fields include 'Invoice ID' (INV-01002-L1W7F3), 'Name' (test account invoice), 'Customer' (Fourth Coffee (sample)), 'Price List' (TEST), and 'Totals' (Detail Amount: Rs.6.00, Invoice Discount: Rs., Pre-Freight Amount: Rs.6.00, Freight Amount: Rs., Total Tax: Rs.0.00, Total Amount: Rs.6.00). The 'Shipping' section shows 'Date Delivered' and 'Due Date' fields. The 'Status' is 'Active'.

Figure 24: Invoice form showing Credit Card button

- Click on Credit Card icon on the top Ribbon as shown above
- On Load of the form Regarding Account or Regarding contact whichever is valid is shown
- The Amount automatically is loaded with respect to the Invoice
- Invoice is also selected for which the payment is asked for
- To Complete the Transaction Information select the Credit Card from the list provided by the lookup screen
- Click on Save and wait

Microsoft Dynamics CRM

FILE CREDIT CARD TRANSACTION CUSTOMIZE

Save Save & Close Delete Save & New Follow Unfollow Collaborate

Credit Card Transaction **New**

Credit Card Transa... ↑ ↓

General

Regarding Contact Regarding Account Fourth Coffee (sample)

Currency Rupee; Owner * sandeep mtc

Transaction Information

Credit Card * Amount * Rs.6.00

Order Invoice test account invoice

Transaction Results

Transaction Date

Authorization ID

Transaction ID

Transaction Result

- The Transaction Results are updated once the processing is done at the gateway
- Transaction Date, Authorization ID, Transaction Id and Transaction Result are displayed

Microsoft Dynamics CRM

FILE CREDIT CARD TRANSACTION CUSTOMIZE

Save Save & Close Delete Save & New Follow Unfollow Collaborate

Credit Card Transaction **Information**

Credit Card Transactions ↑ ↓

General

Regarding Contact Regarding Account City Power & Light (sample)

Currency Rupee; Owner * sandeep mtc

Transaction Information

Credit Card * XXXX0002 Amount * Rs. 1.00

Order Invoice

Transaction Results

Transaction Date 7/29/2013

Authorization ID WS8UNW

Transaction ID 2196276431

Transaction Result This transaction has been approved.

Figure 25: Credit Card operation Successful in CRM Invoice

Credit Card Processing from Account or Contact.

- Credit Card payment can be initiated from either Accounts or Contact Entity also. To enable the process go to **Sales->Accounts** and select any account from **My Active Accounts**
- Double click to open selected account click on **Payments** on the ribbon as shown below

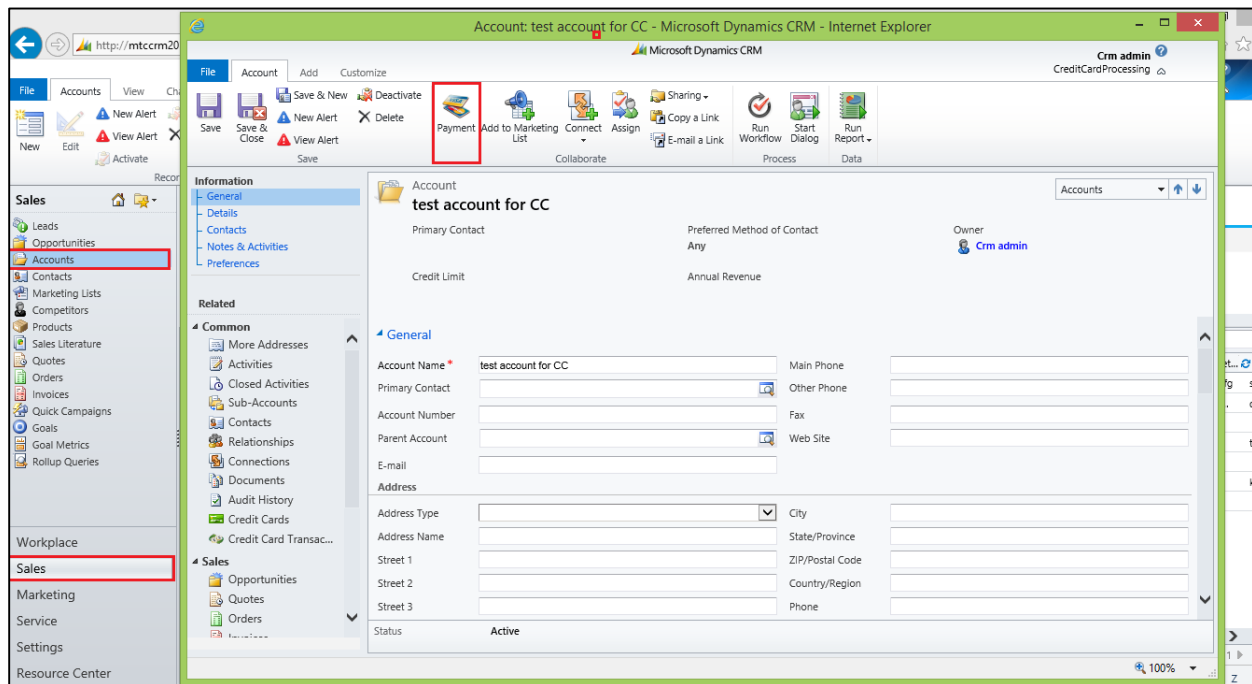


Figure 26: Account for showing payment option

- On Selecting Payments a new pop up window is opened to capture the credit card information
- If the Customer is already having a Credit Card (that is if there is any card processed prior to this transaction) the Credit card details are shown in the second column Credit card.
- All the card numbers (if more than one card) are displayed in this drop down menu
 - Select the appropriate card for payment
 - Card Number, Exp. date & Exp. Year, Card Type are automatically filled with the details and the fields will be in disable mode.
- If the Card is not existing and if it is a New Credit Card, Mention the same in second column against Credit card.
 - Type in Credit Card Number against Card Number followed by
 - Card Number, Exp. date & Exp. Year, Card Type are to be filled with the details and the fields will be in Enable mode.
- Select Others in CC Amount
- Type in Amount (amount to be charged) against this column

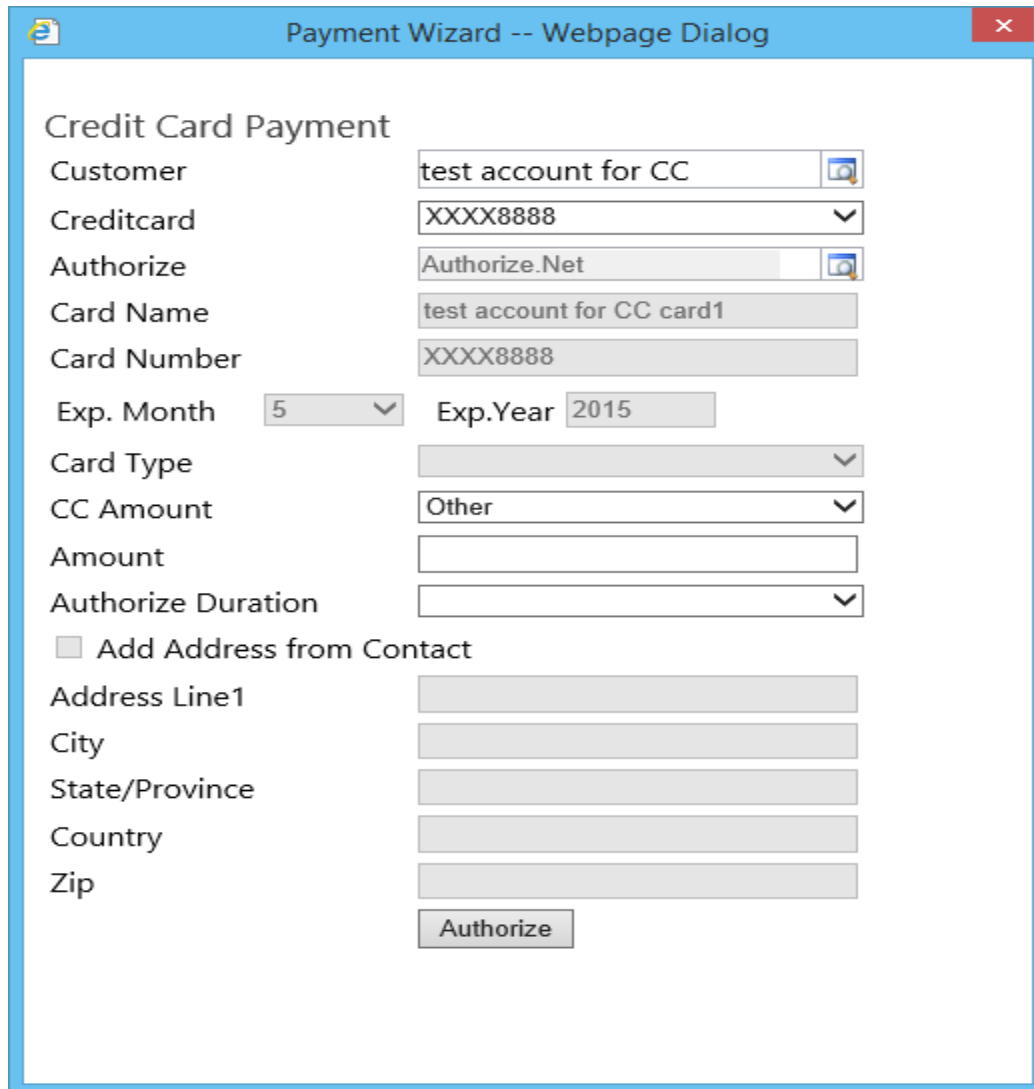


Figure 27: Credit Card Payment wizard

- 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)

- On Selecting the check box against Add Address from Contact, All the Card holders address details are retrieved and displayed accordingly
- Otherwise if it's a new card, then key in all the details like Address Line1, City, State, Country and Zip.
- Finally click on **Authorize** button at the bottom of the Payment Wizard screen.

Clearing House Payments

Note: These payments are only available using the authorize.net payment gateway.

The ability to process ACH payments allows users to tokenize Savings, Checking, or Business Checking account Information with Authorize. Net's Customer Information Management interface for use with future transactions in a safe and secure way.

Minimum Requirements

- The merchant must have a U.S. based merchant bank account that allows internet transactions.
- The merchant must have an e-commerce (Card Not Present) Authorize.Net Payment Gateway account.
- The merchant must have the Customer Information Manager interface activated on their Authorize.Net account.
- This Credit Card processing is presently only valid for American Express, Discover Card, Visa Card and Master Card.

Documentation on Authorize. Net's Customer Information Manager and eCheck.Net services can be found in Authorize. Net's developer center on the Authorize.Net web site. It is highly recommended that users review these documents before engaging in any business activity.

<http://developer.authorize.net/>

Important Notes

- Authorize.Net settles credit card transactions once every 24 hours as per the merchant's Customer Information Manager Transaction Cut-Off Time setting.
- It is recommended that the merchant verify that any funds transferred through Authorize. Net's Customer Information Manager Interface have cleared their merchant bank before rendering services.
- Transactions returned as Non-Sufficient Funds (NSF) may be subject to state mandated returned check fees. For the current fee table, see the following:

https://www.achex.com/html/NSF_pop.jsp

Uninstallation Process

- To uninstall Credit Card Processing, Navigation is **Settings** → **Solutions** → Select the check box of **MTC_CreditCard Processing** then click on **Delete** as shown below.

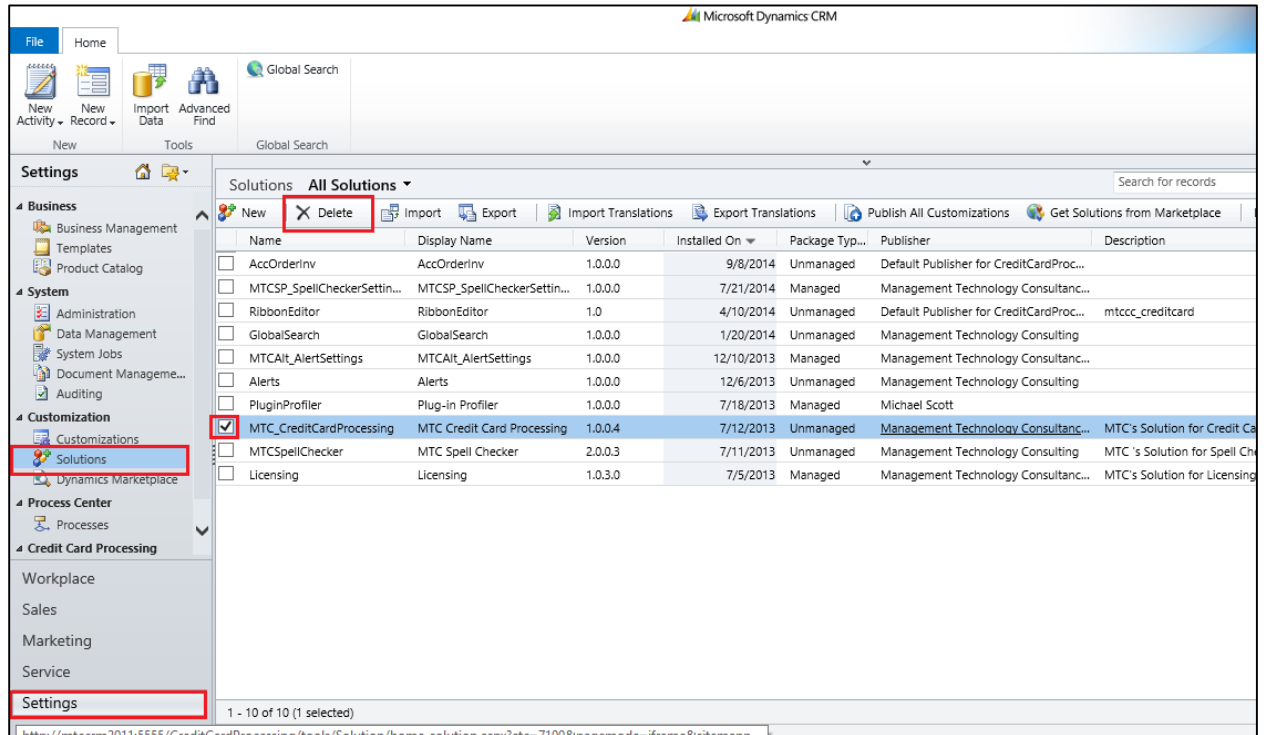


Figure 28: Deleting Credit Card processing Solution

- Click on OK to delete the solution from CRM. The solution will be deleted

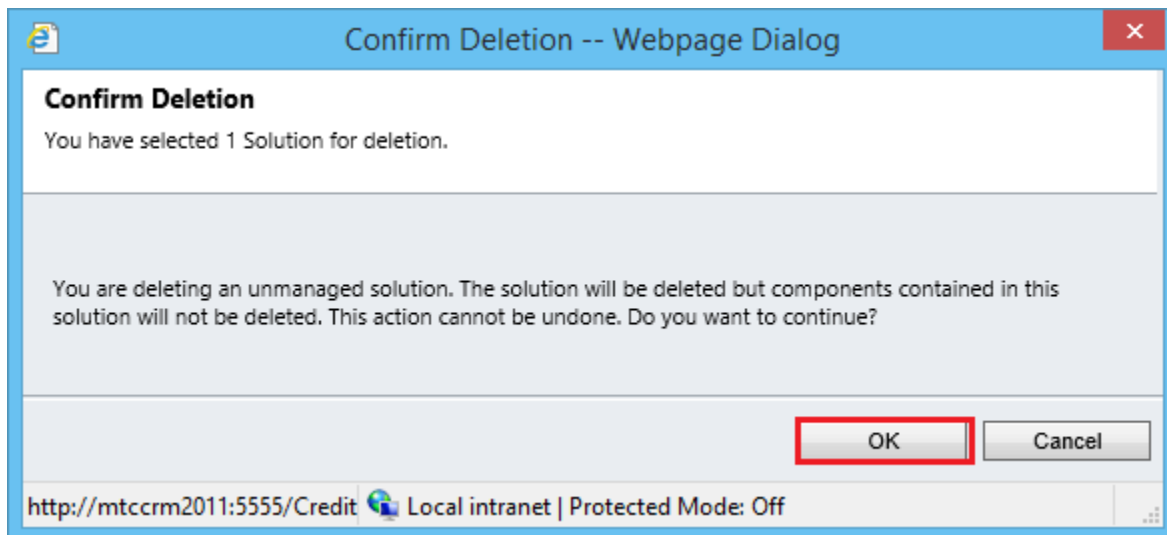


Figure 29: Uninstall Solution

- Follow the above process to delete the Licensing solution also.

MTC Overview

MTC develops an ever growing and extensive family of add-on products, complete solutions, and core development technologies for the Microsoft Dynamics CRM platform. MTC supports a product development effort with a highly efficient global Microsoft CRM exclusive services business 24/7. MTC's products represent the refinements in functionality, deliverability, and long-term maintainability of unique highly customized Microsoft Dynamics CRM platform business solutions suggested as most important in MTC's global volume customization business. MTC runs its internal operations and many of its partners and affiliates with this example



Small and medium sized businesses (SMB) can now affordably build the kind of enterprise automation system that distinguishes the best unique-line-of-business enterprises on earth. MTC uniquely delivers a very-unique service of clear value to businesses globally seeking automation as a business advantage.

SMB Custom Enterprise is your business's exact fit for a complete low cost business-specific companywide automation solution - marketing to operations to accounting in a closed loop - built on the Microsoft Dynamics XRM platform technologies. Starting with the Microsoft CRM platform in either a monthly Online or wholly owned on premise implementation you choose from a large and growing set of packaged option functionality where you determine what non-standard additional functions you want on this solution, then add them.

For more information on the dozens of integrated products of the "SMB Custom Enterprise" solution set visit: www.MTCCRM.com MTC's low-cost and fixed-rate professional services current rate schedule: www.MTCCRM.com/MTC_Services.pdf.

Management Technology Consulting LLC (MTC) is dedicated exclusively to the Microsoft Dynamics CRM platform and CRM web portal technologies in the business of delivering add-on products and services.



MTC is a Microsoft Independent Solution Vender working on Microsoft CRM since the introduction of the platform. MTC's product offerings include development technologies for the Dynamics CRM platform, add-on enhancements of features and major functions to CRM, as well as complete vertical-market Enterprise versions of Dynamics CRM serving an every growing list of industries and organization types.



MTC's services are built on a global 24/7 rapid-response and low-cost and fixed-rate ease of engagement. MTC is US headquartered company optimized for low-cost on-demand global engagement with regionalized contacts and a development facility in Hyderabad India adjacent to Microsoft's facility.

The Global CRM Community DynamicsExchange.com

MTC is the founding and managing partner of the Microsoft Dynamics CRM platform Community at www.DynamicsExchange.com. Dynamics Exchange is crowd-source built and dedicated to driving down the costs of implementation and enhancement of the Microsoft Dynamics CRM platform with unique and innovative social networking and knowledge resource allocation processes.

Dynamics Exchange is the leading community free and open to Microsoft CRM uses and professionals for support, training, knowledge, products, and services worldwide.

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Availability and hours of operation: Monday to Friday

USA PST 323-851-5008 - 8:00 AM to 6:00 PM

India IST 323-863-0077 - 8:30 PM to 8:30 AM in PST

USA Headquarters:

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7738 Sky hill Drive, Los Angeles, CA 90068

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