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
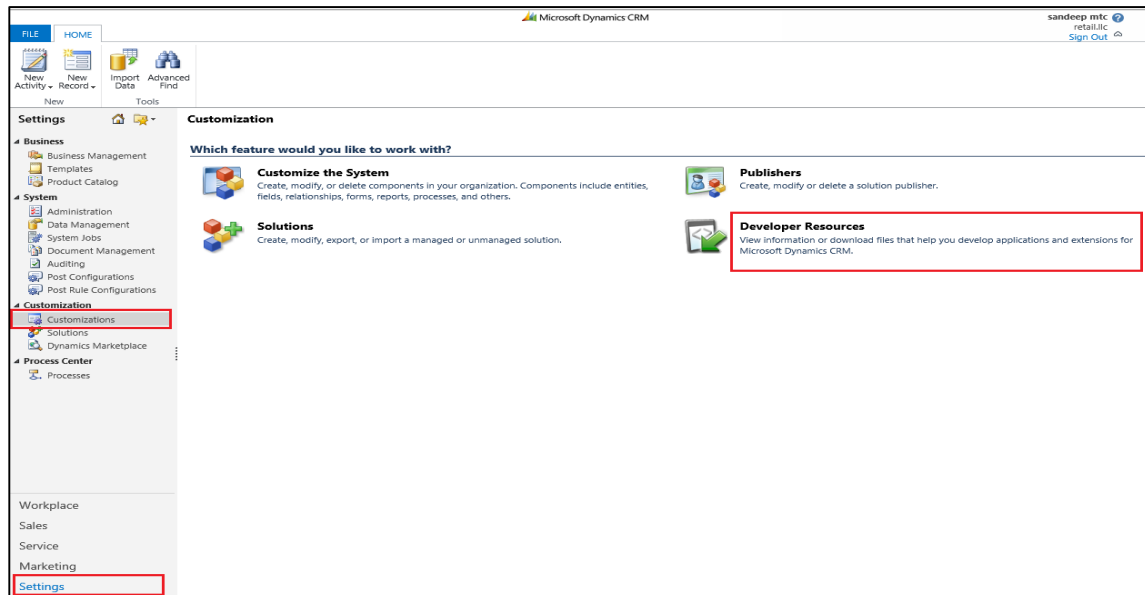

Figure 1: Developer Resources

➡️ 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 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 has 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
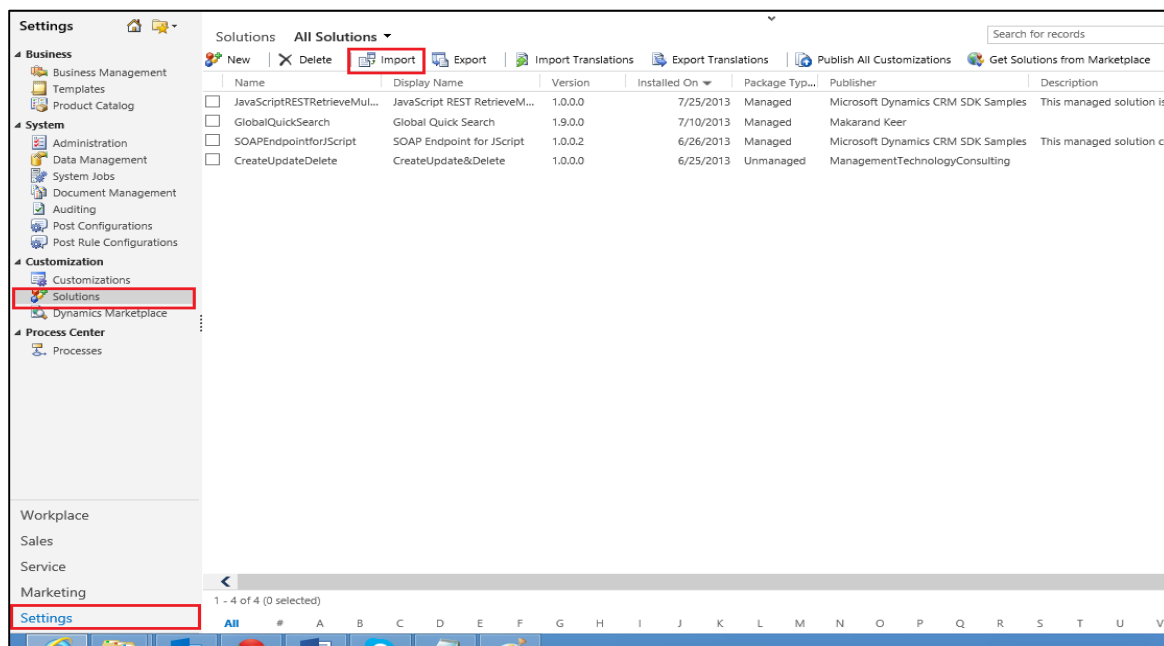
Installing Licensing Solution
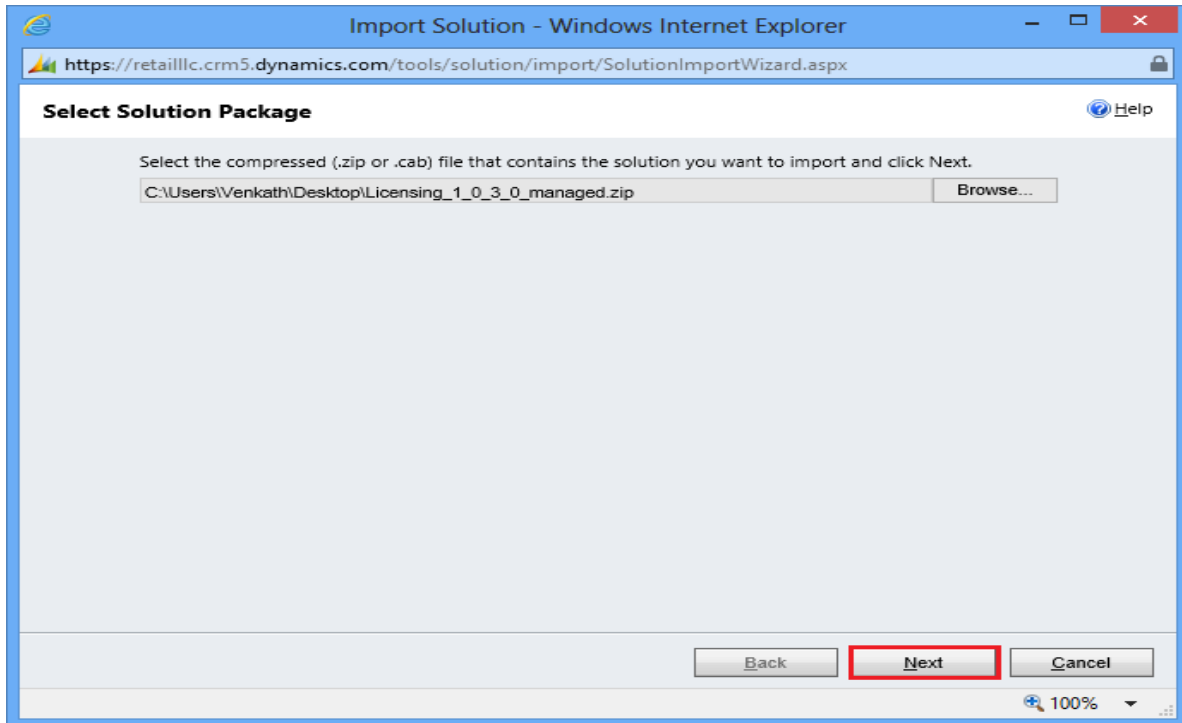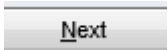
Figure 4: Select Solution Package

➡ In Import Solution Window you can browse and Select Solution Package zip file and then click on

[Next] for further processing.
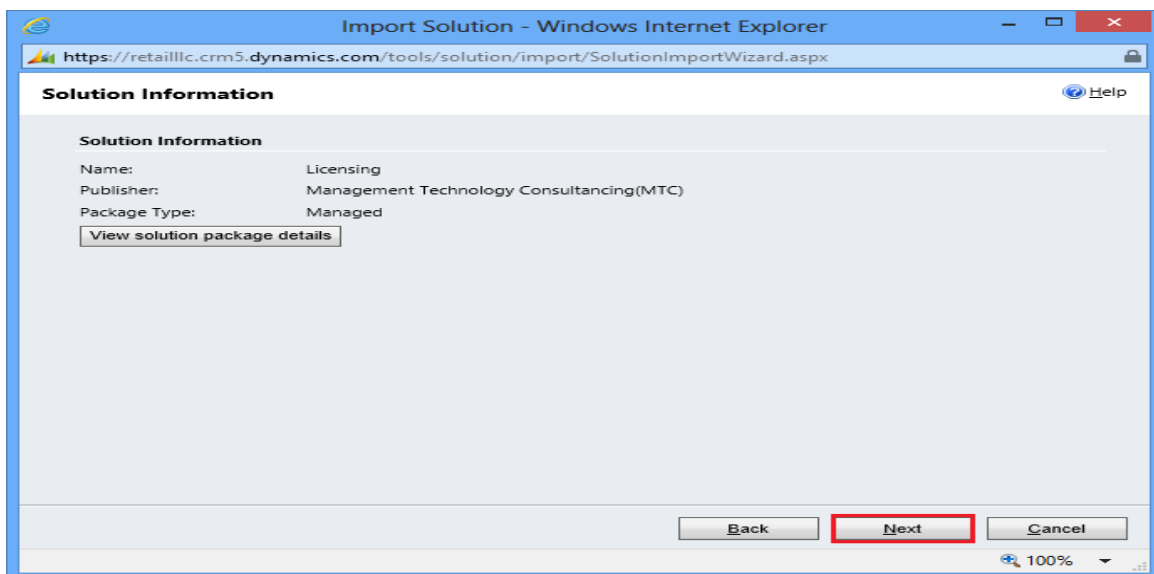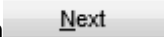
Figure 5: Solution Information

➡ Click on [Next] to proceed
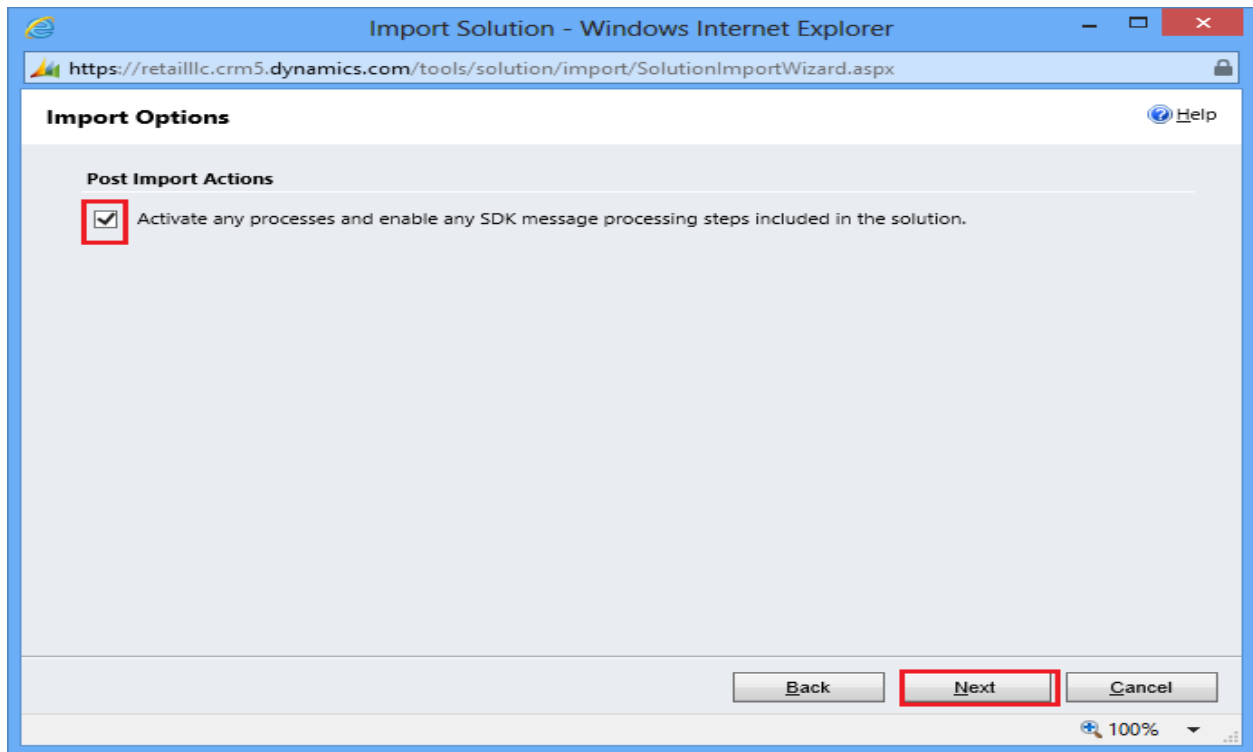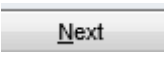
Figure 6: Import Option

➡️ Click on [Next] to proceed

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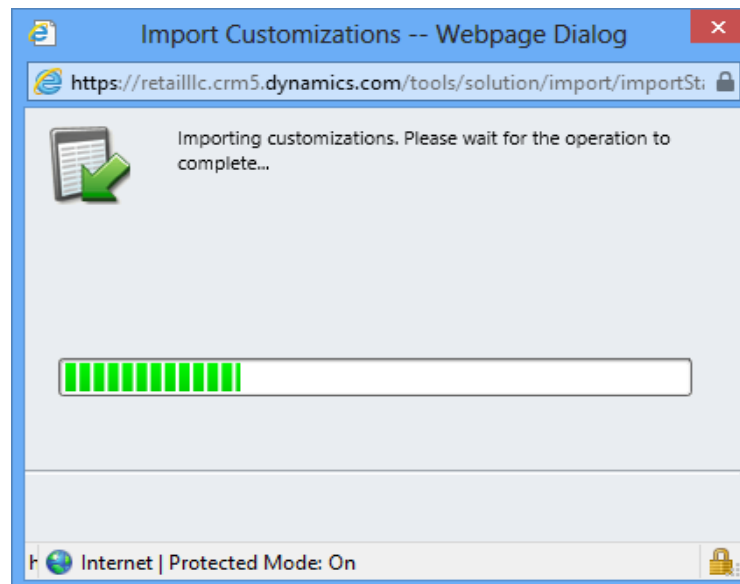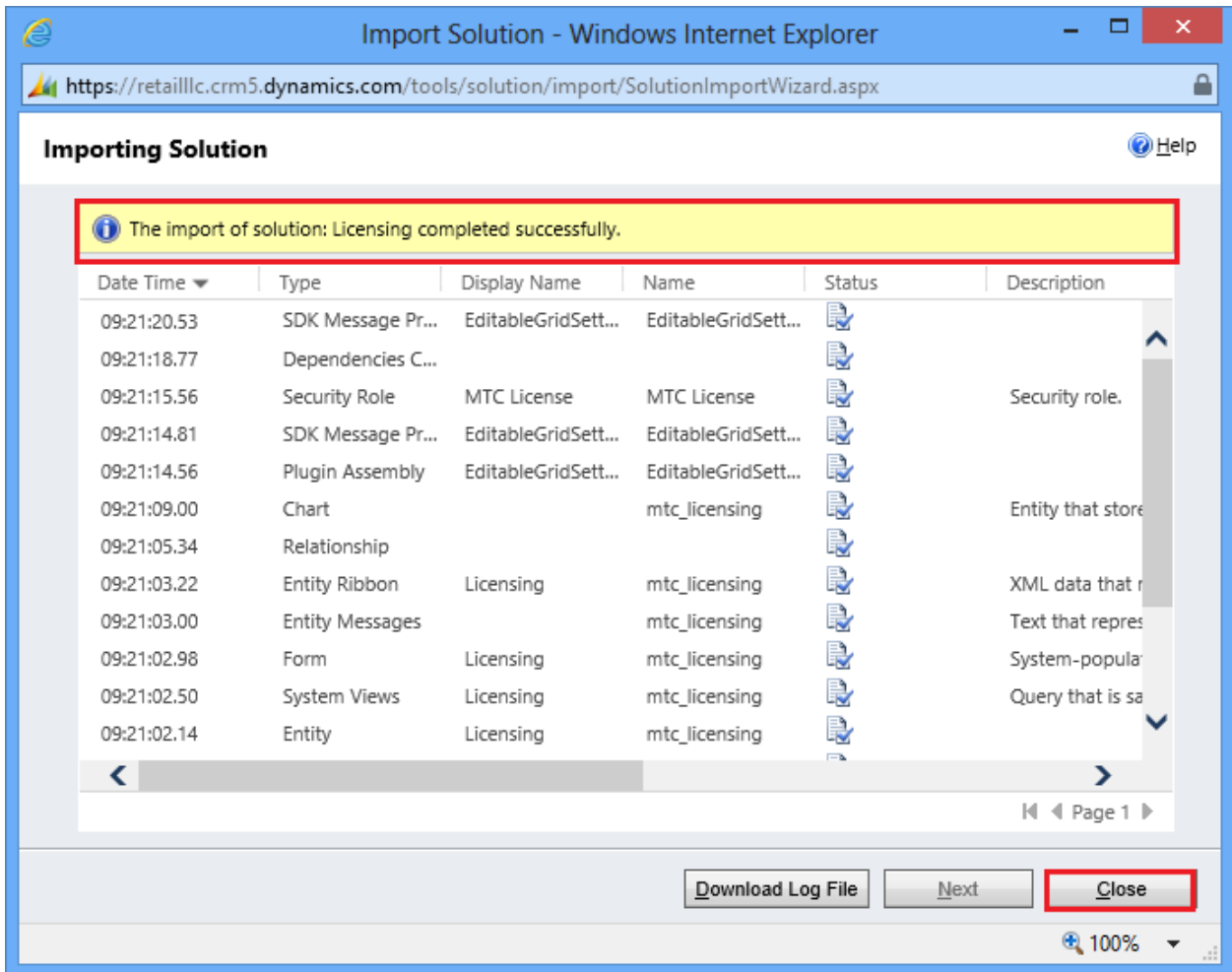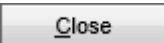
Figure 7: Importing Solution - Licensing

➡ Click on [Close] after successful completion message is displayed.

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Installing Credit Card Processing Solution
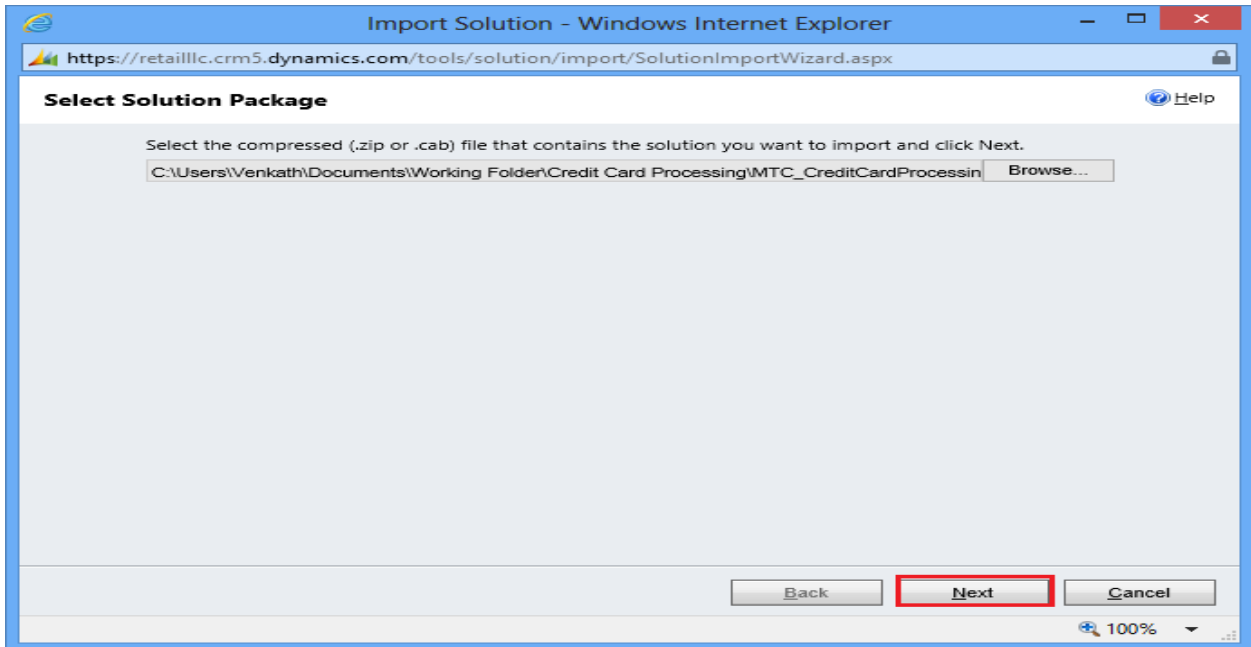
Figure 8: Select Solution Package – Credit Card

➡️ Click on [Next] to proceed.
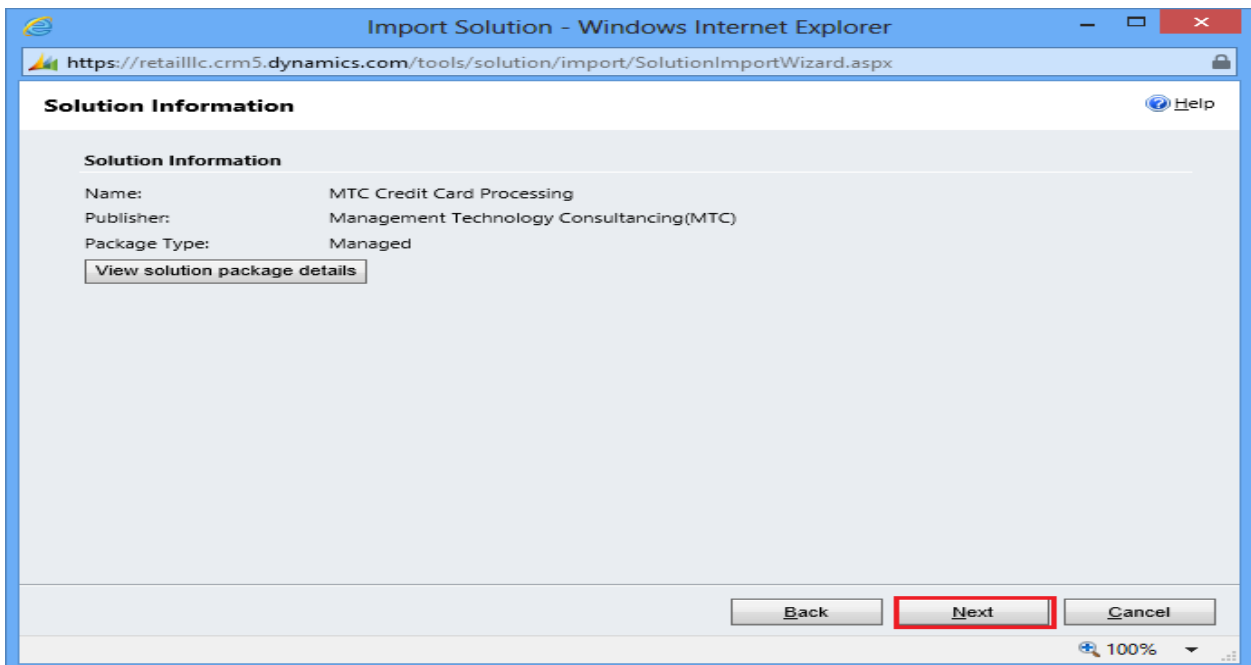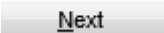
Figure 9: Solution Information

➡️ Click on [Next] to proceed.

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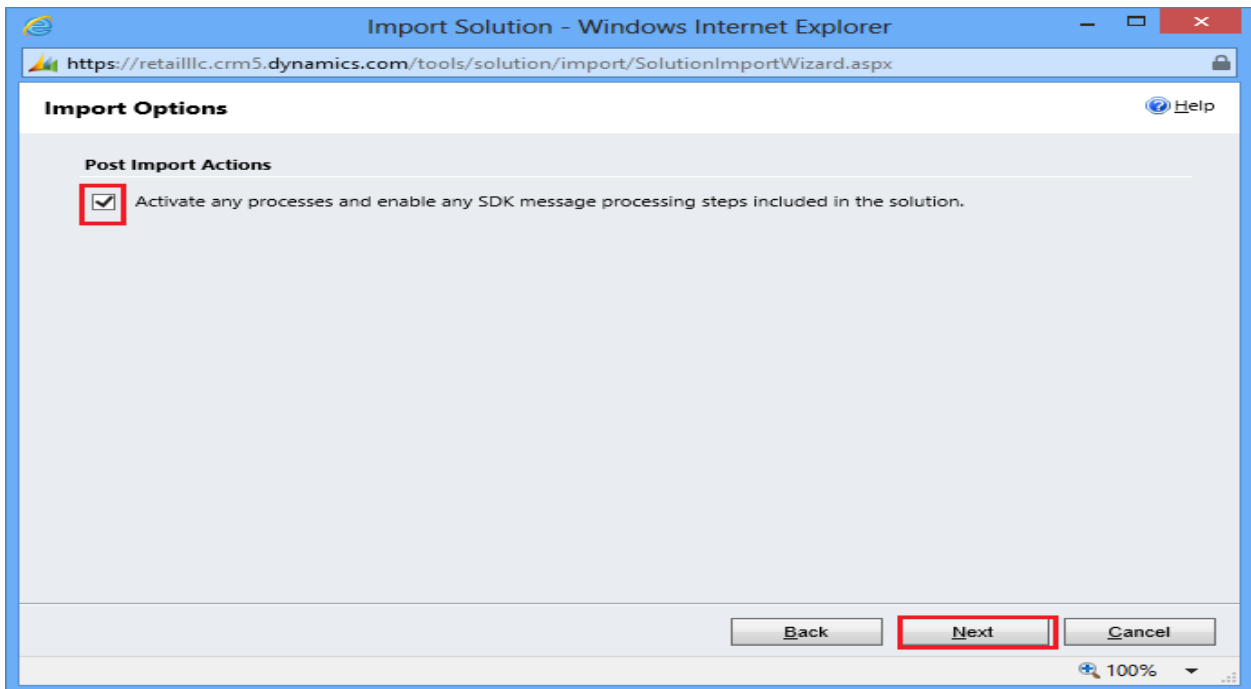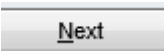
Figure 10: Import Option – credit card

➡ Click on [Next] to proceed.

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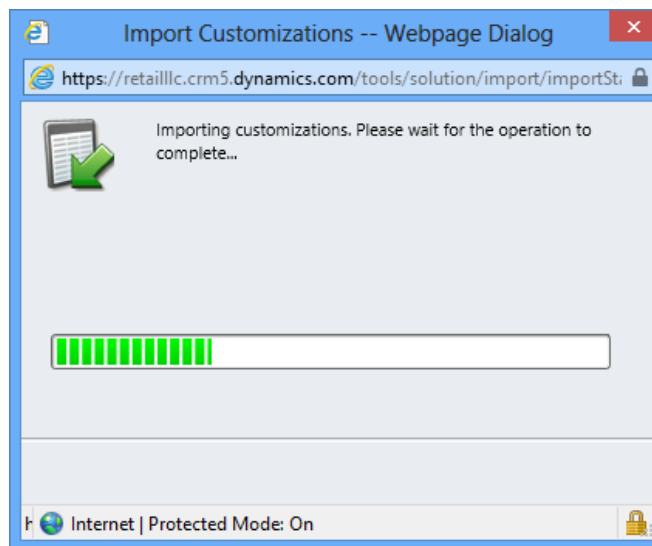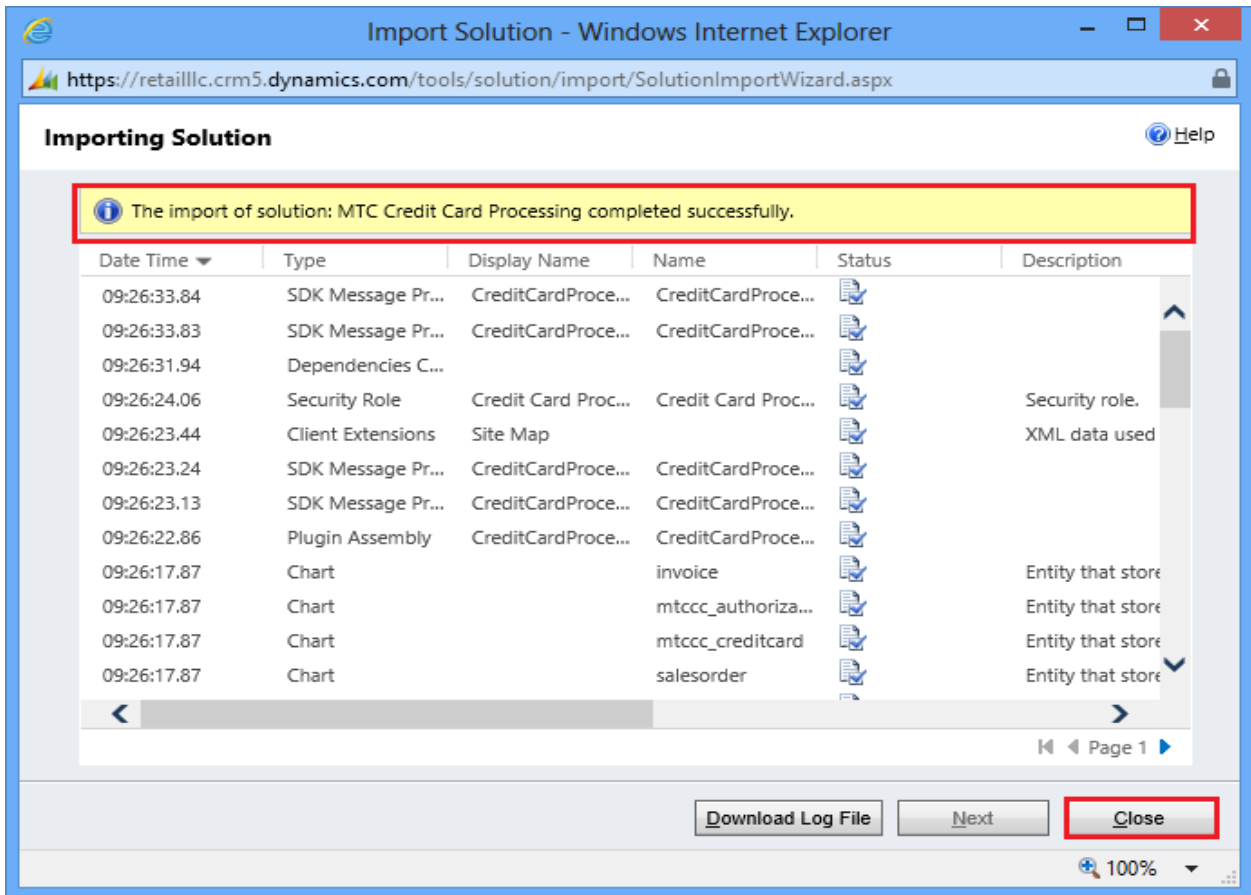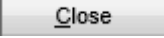
Figure 11: Importing Solution - Credit Card

➡️ Click on [Close] after successful completion message is displayed.

Placing License Key

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

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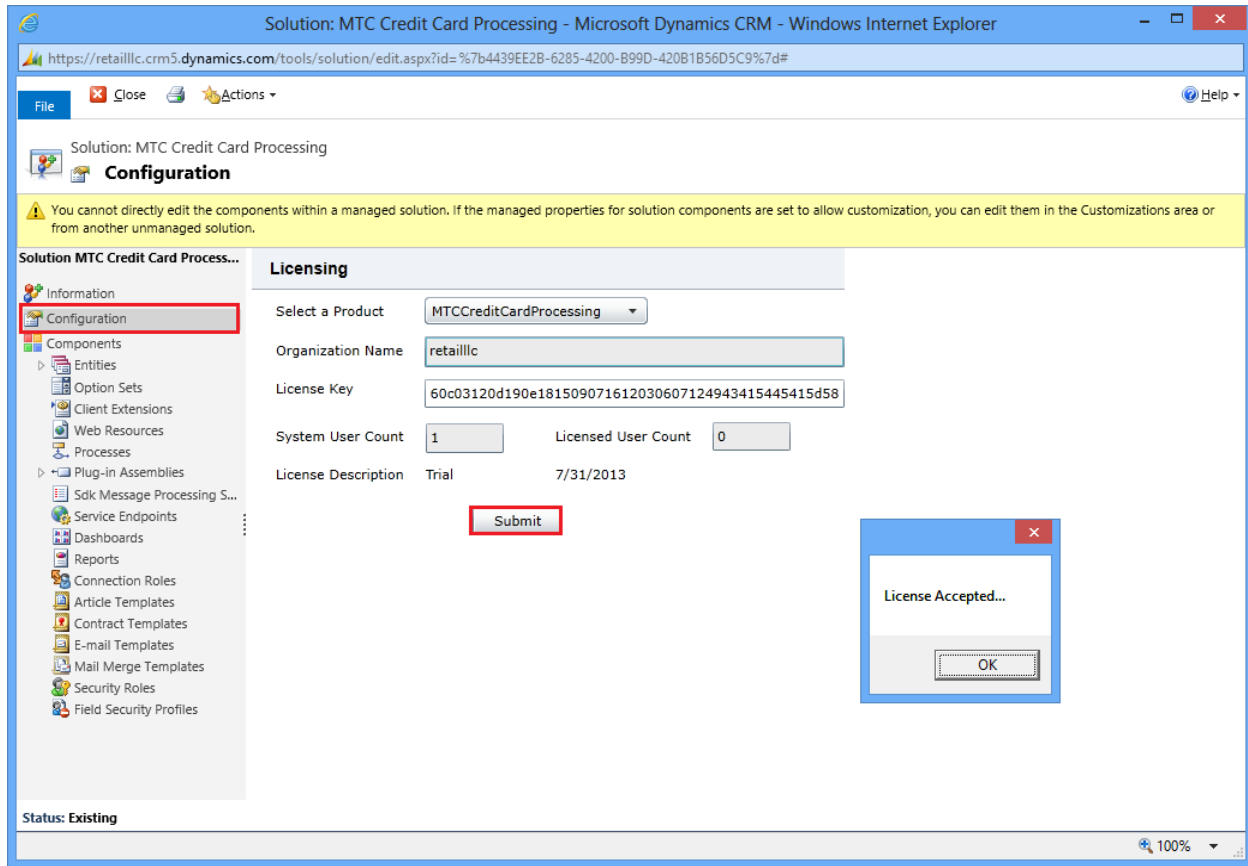
Figure 12: License Key for Credit Card

➡ 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 resister 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/
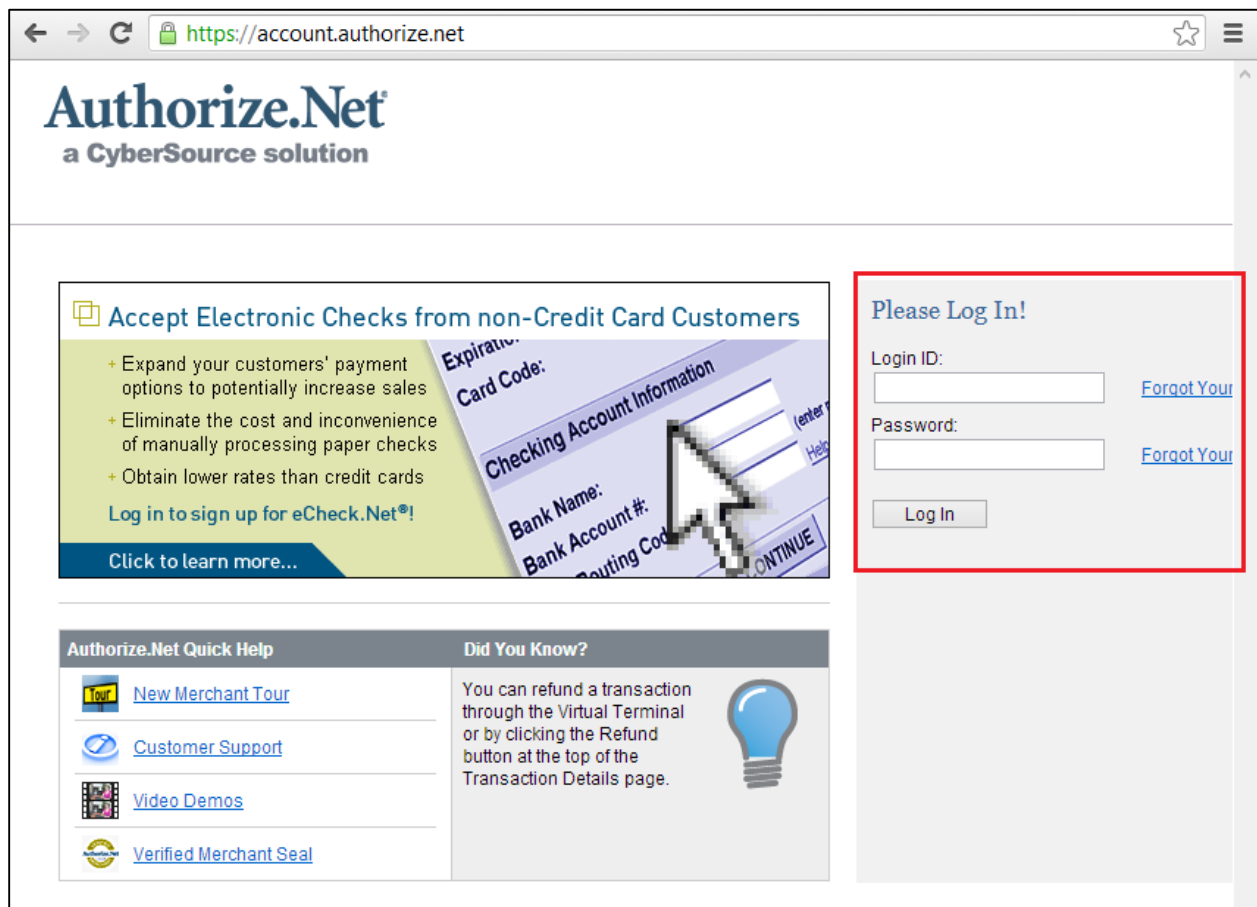
Figure 13: Authorize.net Merchant Login Screen

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

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Figure 14: Authorize.net - Select Account
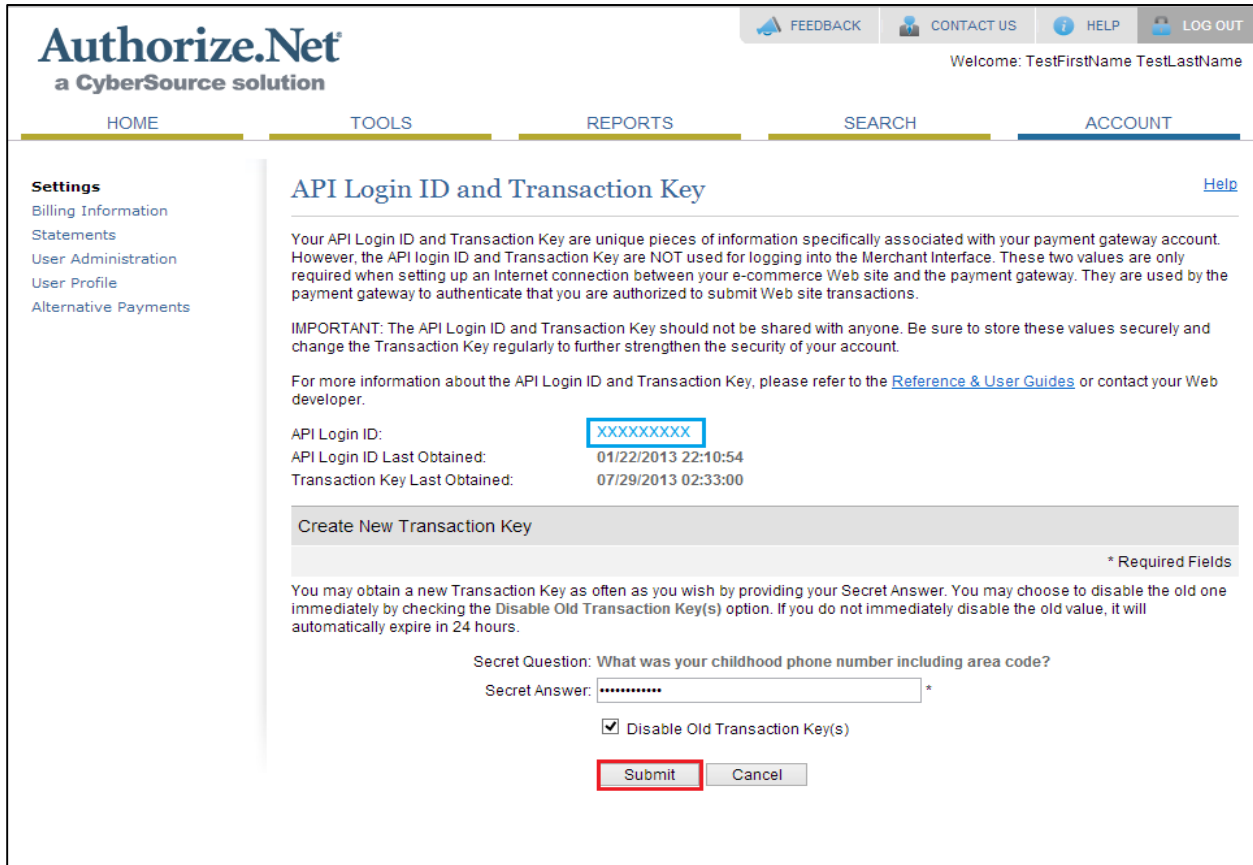
- One the Setting screen is opened click on API Login ID and Transaction key as shown below

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

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

Figure 16: API Login and Transaction Key

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

Figure 17: Transaction Key - Authorize.net

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- Click on Continue

- Store and Record API Login ID and Transaction Key details

- Now Go to **CRM->Settings->Credit Card Processing->Authorizations**
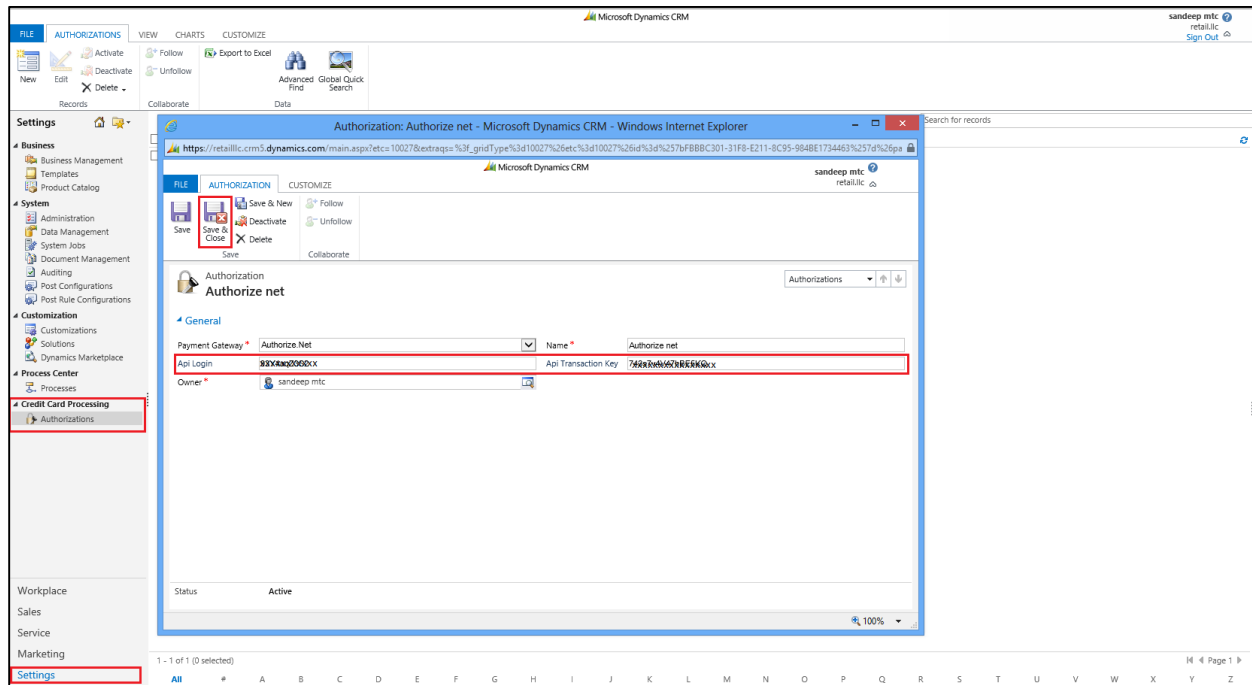
Figure 18: CRM screen - Storing API Login details

- 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
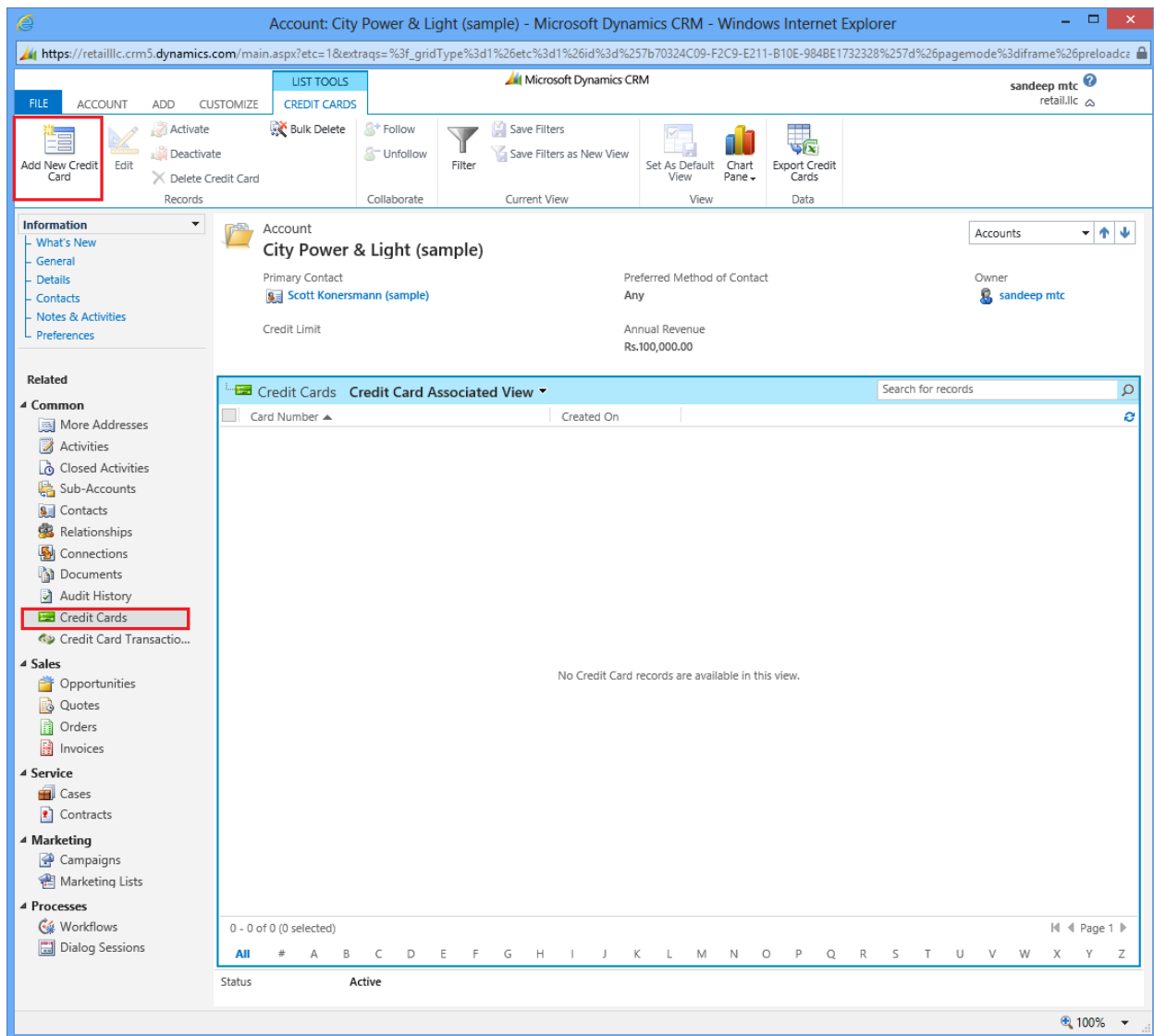
Figure 19: CRM Account showing Credit Card view

- Click on Credit Cards on the left panel as shown above
- Select Add New Credit Card button on the top ribbon as shown above
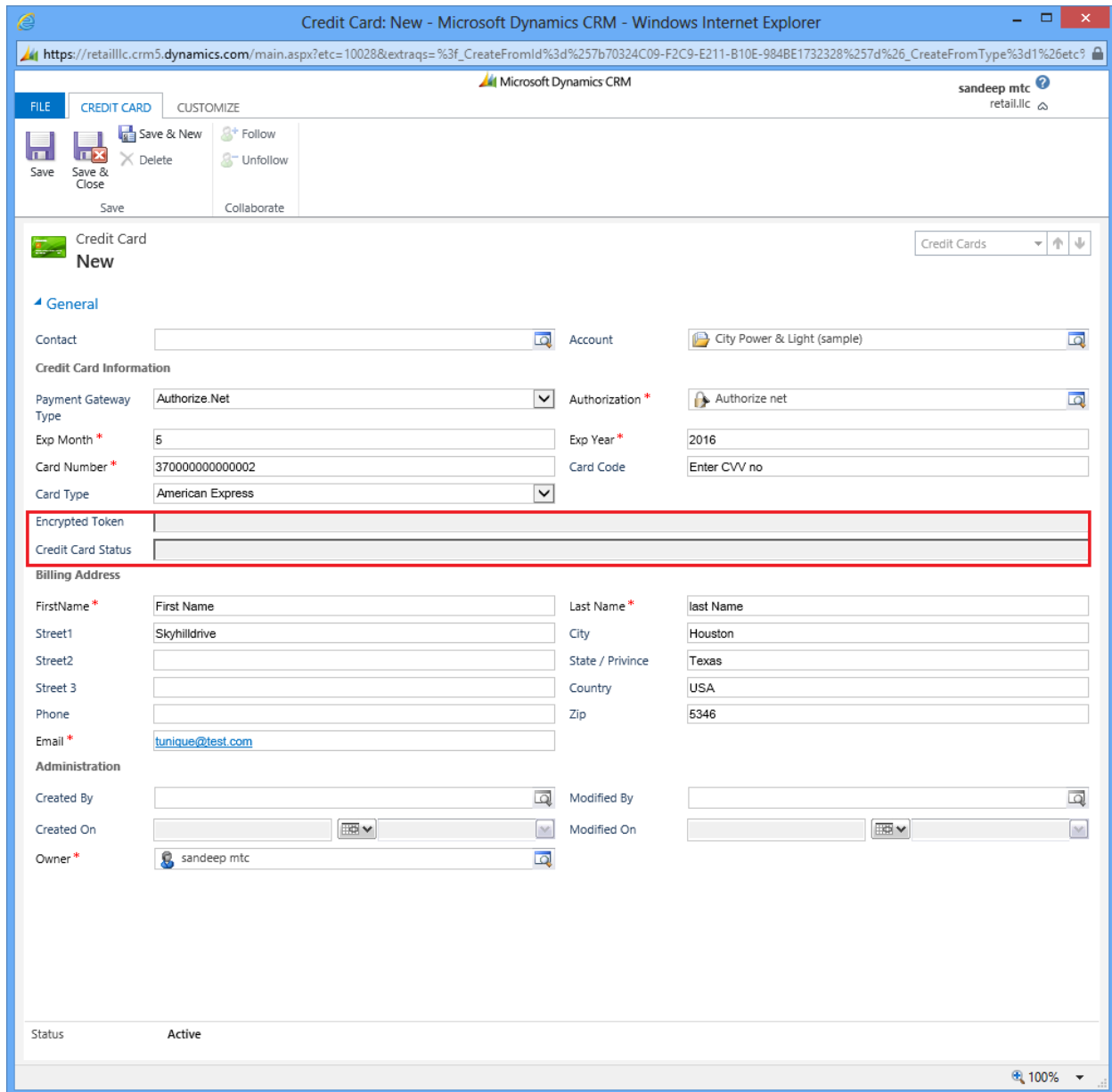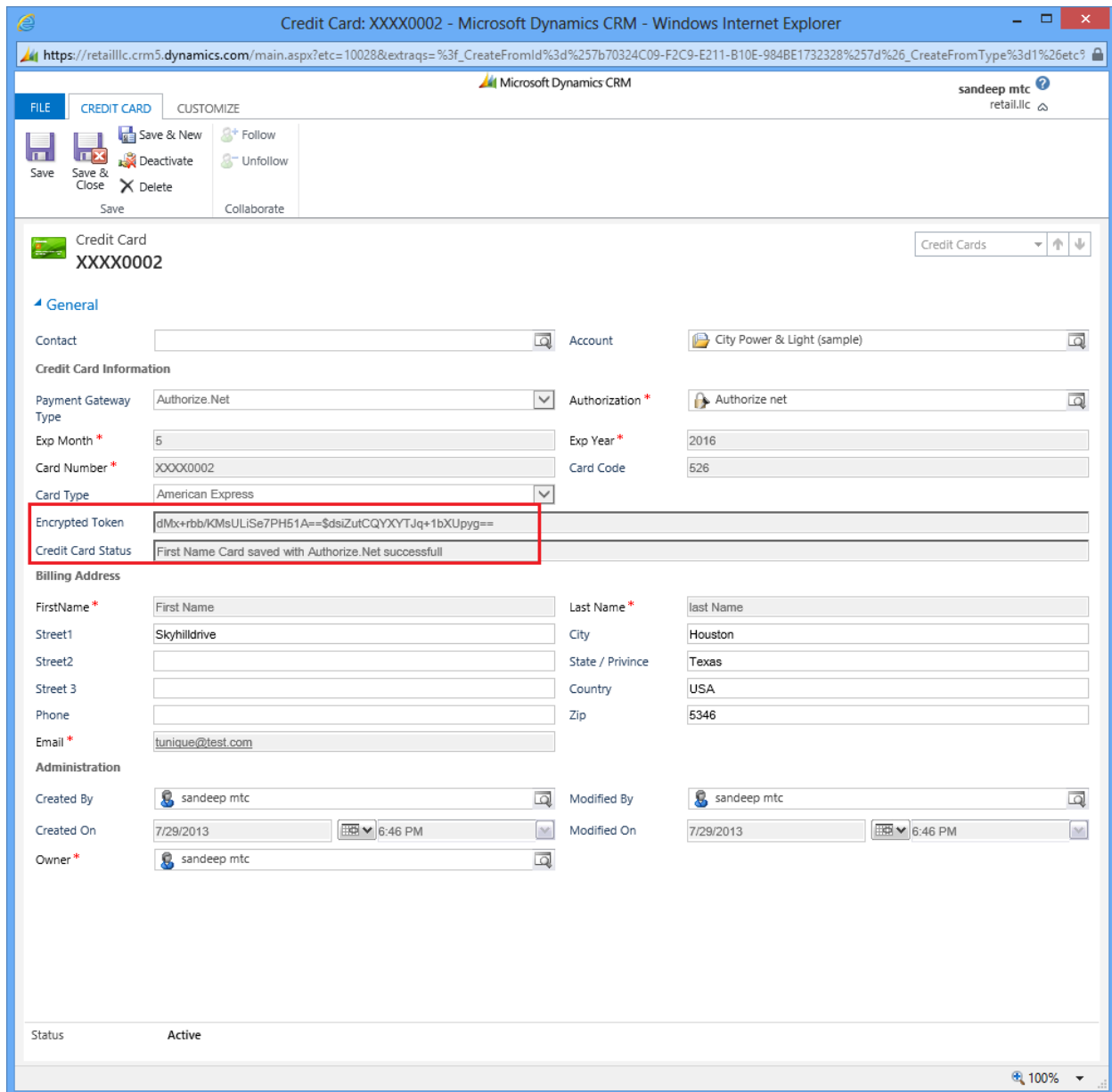
Figure 20: New Credit Card form with details

- 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.**

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- 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

Figure 21: Encrypted values stored in CRM

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Credit Card Processing

- Go to **CRM->Workplace->Customer-> Accounts->Credit Card Transaction**

- Click on Add New Credit Card Transaction as shown below
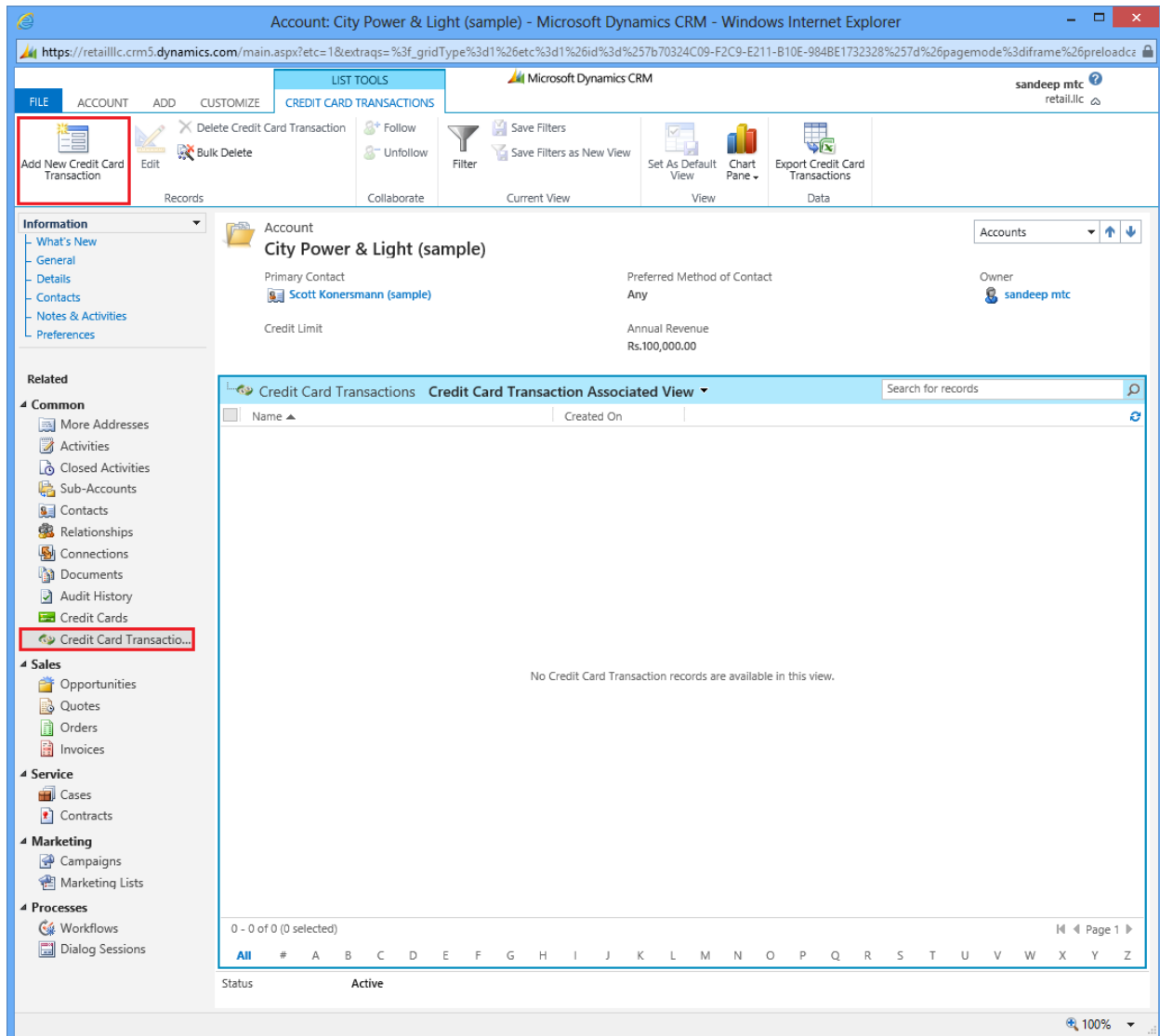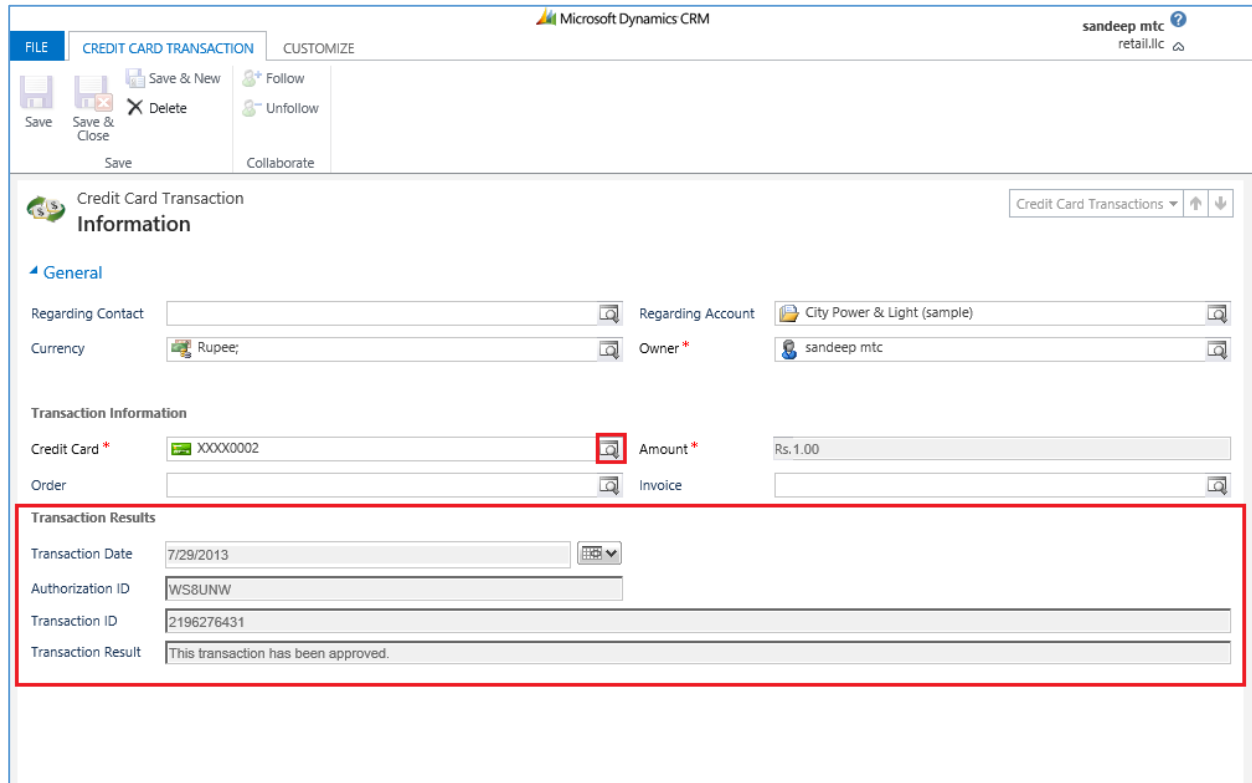
Figure 22: Select to enter Credit Card details in CRM for Account

- 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)

Figure 23: Showing Approved Transaction

Credit Card Processing from Invoice

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

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

- The Transaction Results are updated once the processing is done at the gateway

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

Figure 25: Credit Card operation Successful in CRM Invoice

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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
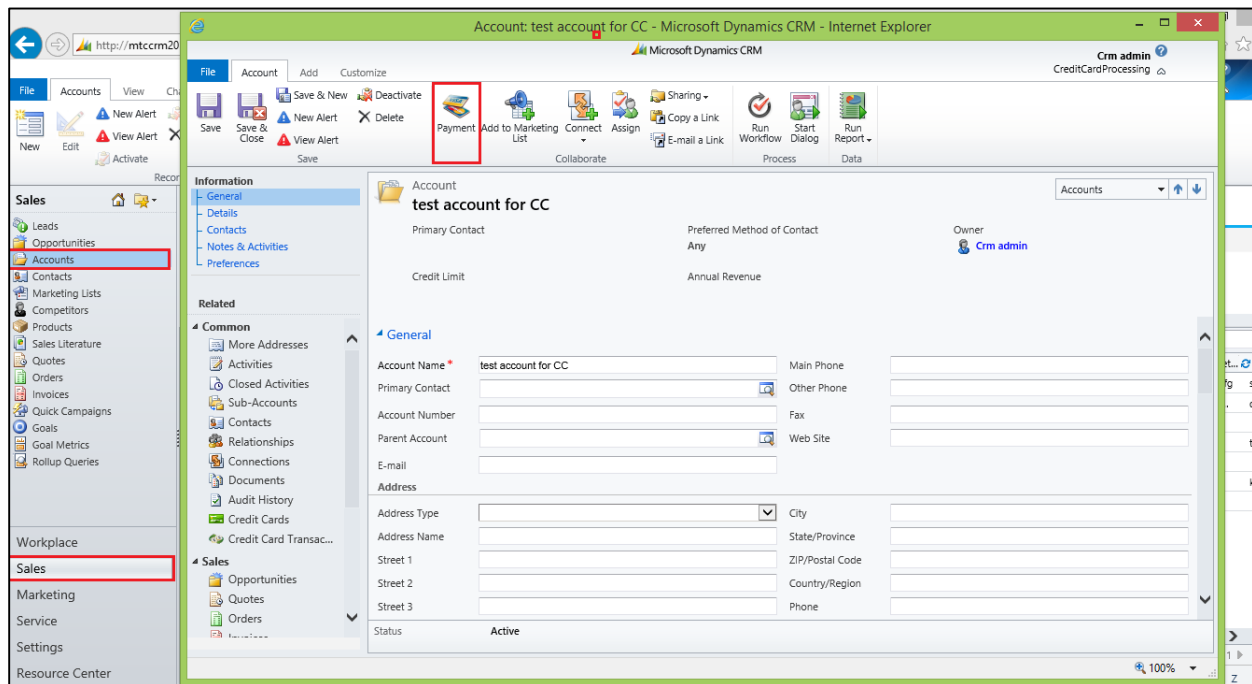
Figure 26: Account for showing payment option

- 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

  o Select the appropriate card for payment

  o 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.

  o Type in Credit Card Number against Card Number followed by

  o 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
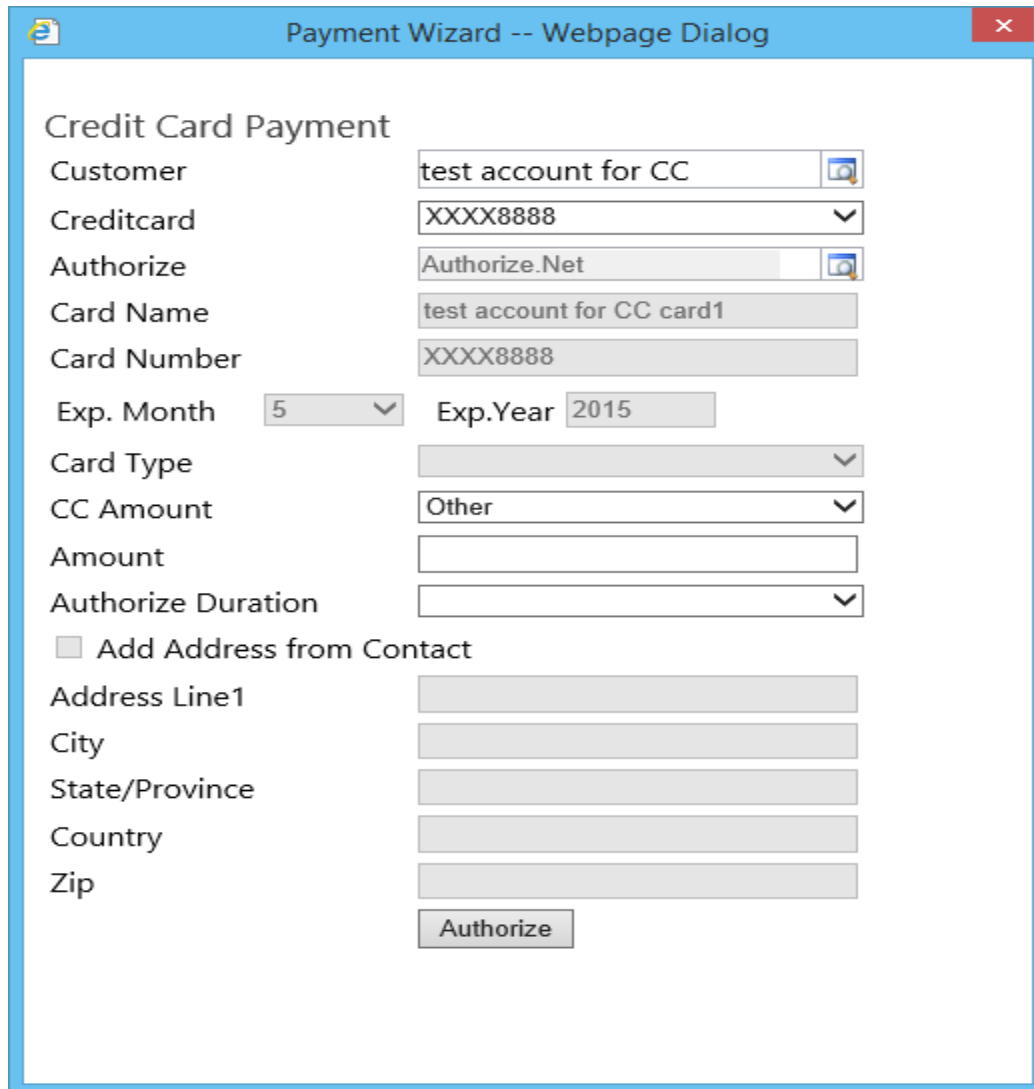
Figure 27: Credit Card Payment wizard

- 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

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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.
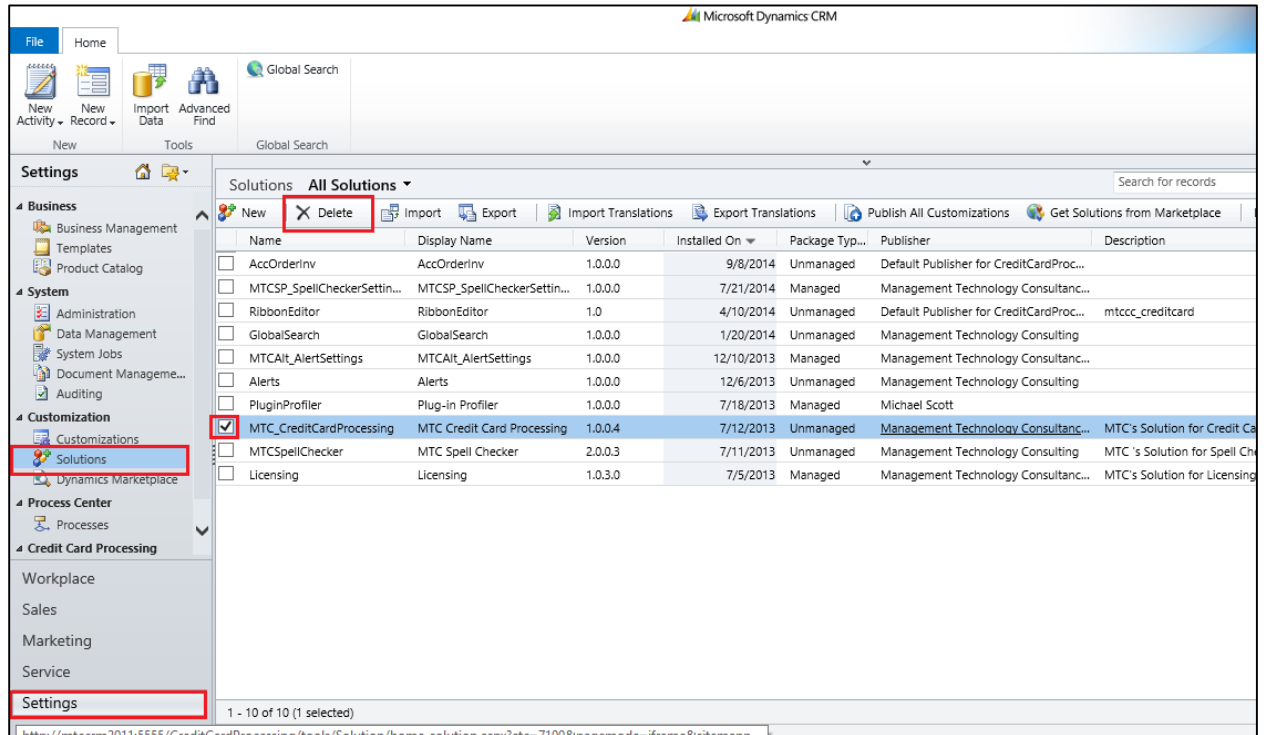
Figure 28: Deleting Credit Card processing Solution

- Click on OK to delete the solution from CRM. The solution will be deleted
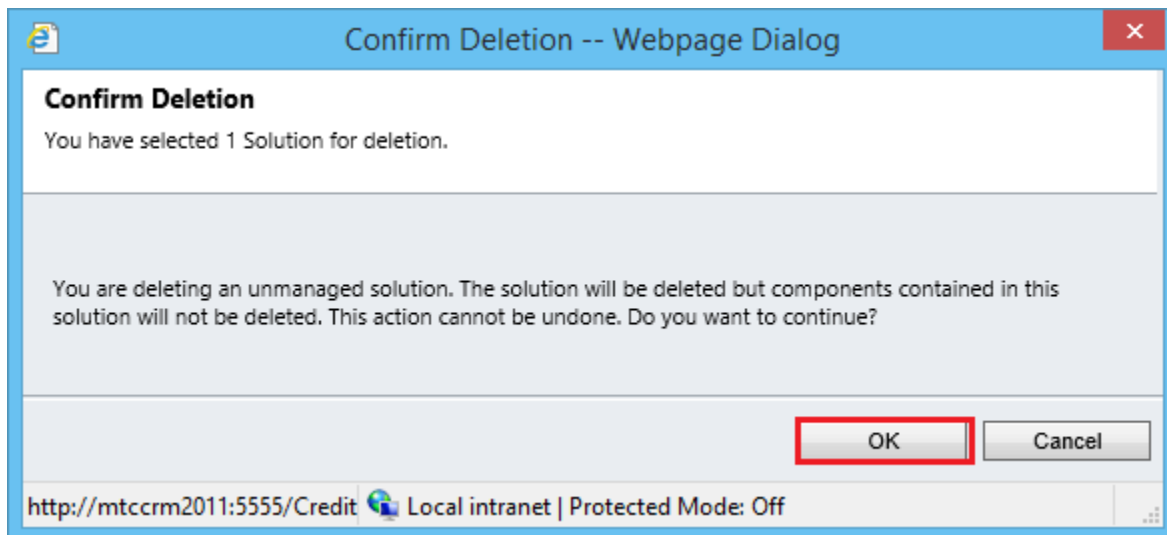
Figure 29: Uninstall Solution

- 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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