Dynamica Stripe Integration User Guide

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Stripe Integration Configuration

To configure Stripe to Dynamics 365 integration complete the following steps:

1. Go to https://stripe.com and click "Dashboard".



2. Find your API keys In the API section

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3. In Dynamics 365 go to **Settings -> Solutions** and double-click **Dynamica Stripe Integration** solution and switch to **Configuration** page



4. Copy Publishable and Secret keys into the form and Save it.

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The configuration is done and the solution is ready to use.

Add Credit Cards

To add Credit Cards and associate them with a customer:

1. Open Contact or Account record of a customer;

2. On the ribbon of Contact or Account form find Create Stripe Card button;

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3. Input Card Number, MM/YY, CVV and click **Create;**

4. The system will process the request and if the credit card information is correct – it will show a message: **Success. You have successfully added a card!**

Important: customer must have email on the record in order to associate credit cards with him.

Charge Payments

To charge a customer:

- 1. Create an Invoice or Open existing one;
- 2. Find **Charge** button on the ribbon of Invoice form;
- 3. Select the customer's **Credit Card** from the drop-down list and click OK.

Important: customer must have at least one card previously associated with him. See Add Card paragraph above;

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4. A **payment request** will be created. It may take some time to process the transaction.

Track the Payment Request status

- 1. Find the **payment request** in payment requests view: **Stripe -> Payment Request**;
- 2. Open a Payment Request record;

3. You can track the Payment Request **status** in **Operation Details** section

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Currency	US Dollar	*Customer			
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4. Payment requests associated with invoice can also be found on **Invoice -> Stripe Invoice Form** in **Payments sub-grid**;

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5. When the **Payment** is processed – it becomes **Inactive**;

6. If you want to see the **Payments sub-grid** on any other form – add it with **Form Editor**.

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Payments Scheduling

The solution allows creating payments schedule (recurring payments).

To create payments schedule, go to **Stripe -> Payment Schedule Requests** and then select **New** to created new schedule.



The Payment schedule request form has following fields:

Header section

Status	Active, Inactive
Status Reason	Draft, Scheduled, Inactive
Next Payment Date	The date of the next payment

General Fields and Settings

Name	The name of the schedule
Payment Frequency	Payment Frequency can be set to Daily, Weekly, BiWeekly, Monthly, BiMonthly, Quarterly
Frequency Configuration	Allows to specify the day of the period when the payment should be made
Start Date	Start Date of Payments Schedule (used as a start point in schedule calculation. If the day on which payments should be made is doesn't match the start date – the actual date of the first payment after initial payment can be different
End Date	End Date of Payments Schedule (used for schedule calculation. Can be different from actual date of the last payment in the schedule
Description	Schedule description
Count	Total Count of Payments
Each Amount	Amount of each payment
Currency	Invoices Currency
Pricelist	Invoices Pricelist
Initial Amount	Amount of the Initial payment that should be made right after schedule creation
Total Amount	Total Amount of all payments (includes initial payment)
Total Charged Amount	Total Amount of already made payments (The field may take some time to update)
Total Pending Amount	Total Amount that remains to be paid

Other Fields and Settings

Customer	Lookup on customer record
Payment method	Customer Credit card
Auto-capture Initial Payment	Allows to automatically charge initial payment right after schedule creation
Auto-capture invoices	Allows to automatically charge payments on due dates

To create Payments Schedule – fill in the form and **Save** the record.

The solution will calculate and create payments schedule. Status Reason will be changed to **Scheduled**.

When a payment plan is scheduled – the solution will create invoices on due dates and automatically charge the customer if **Auto-capture invoices** option is set to **Yes**.

Direct payment requests

You can also create direct payment requests bypassing invoices.

- 1. Go to Stripe -> Payment Requests;
- 2. Click New;
- 3. Fill in the form and Save it;
- 4. Wait some time while the payment is processed

5. You can track the **status** in **Operations Details** section (you may need to refresh the page in order to see changes);

Note: currently there Is no Credit Card filter on Direct Request form: you can see all Credit Cards in Credit Card Lookup, not only associated with the customer. If you will select card which is not associated with the customer – it will be added to a request, but after processing, it will return an error

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Restrictions

1. When **adding credit card** - The Solution **doesn't check** credit cards for **duplicates** and allows you to add the same credit card several times to the same customer;

2. There is **no Credit Cards filter** by customer on **Direct Payment Request** (request created bypassing Invoice) – you are allowed to add any credit card existing in the system even not associated with the customer;