Dynamica Stripe Integration

User Guide



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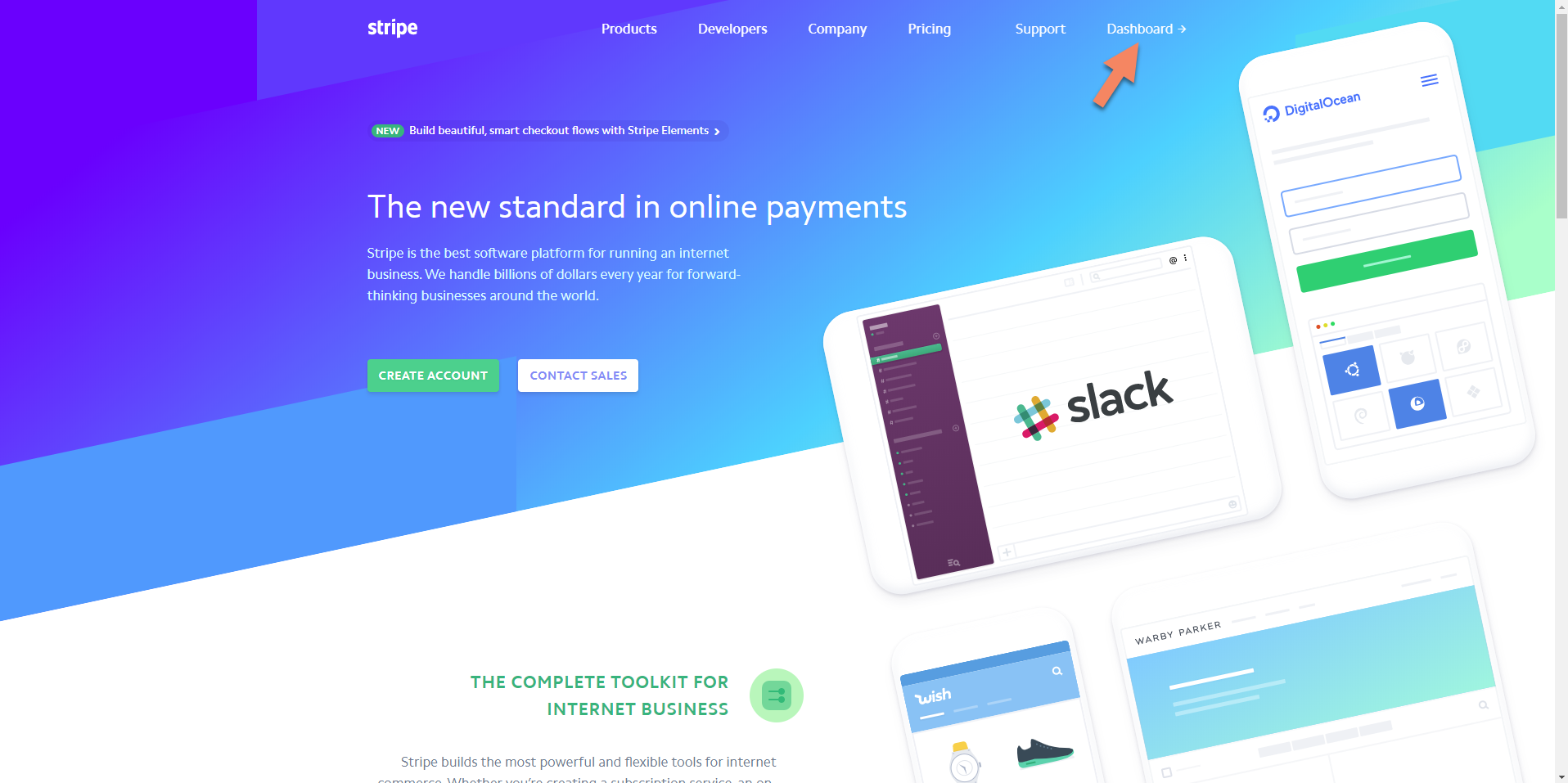
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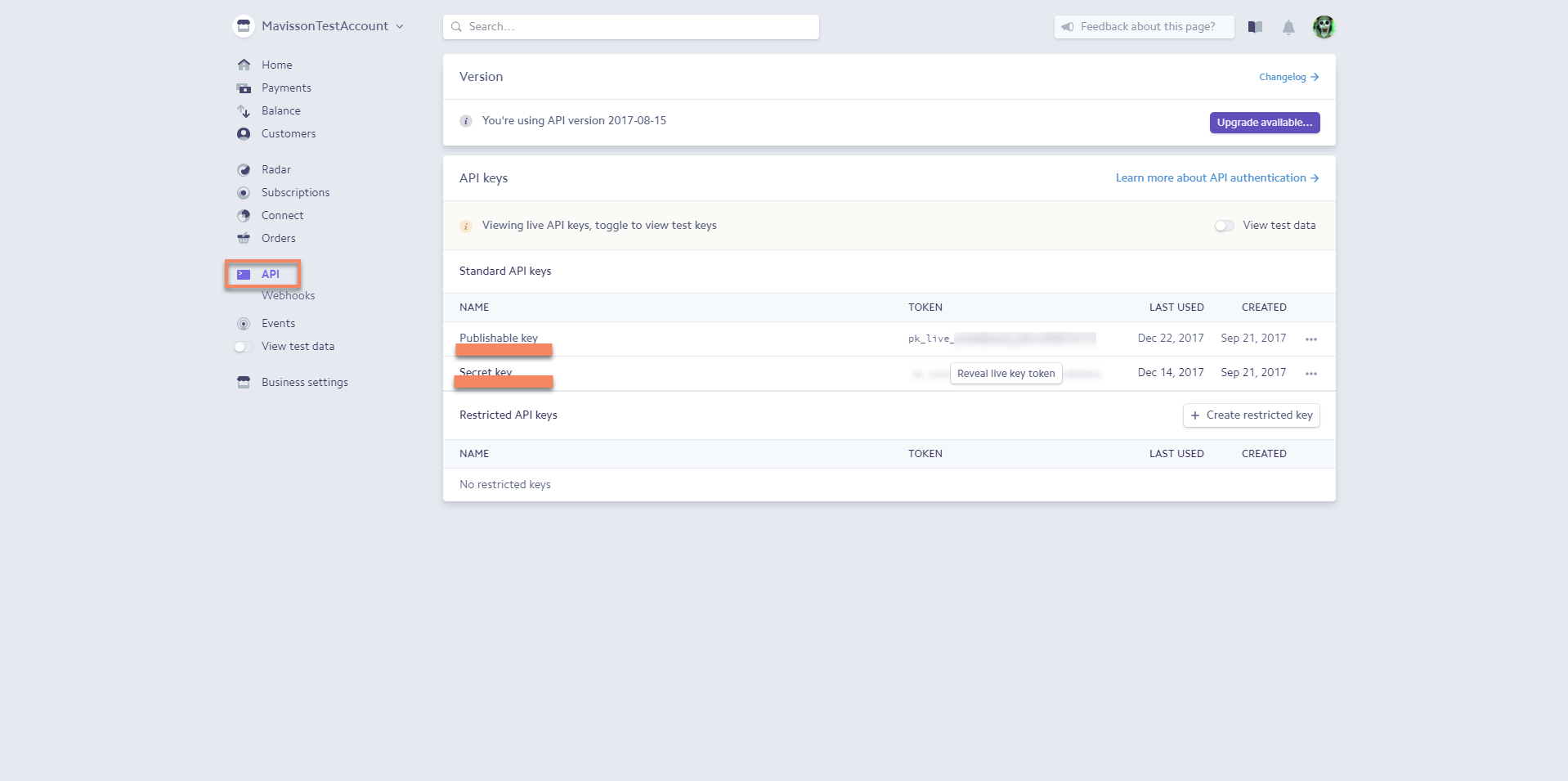
# Stripe Integration Configuration

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

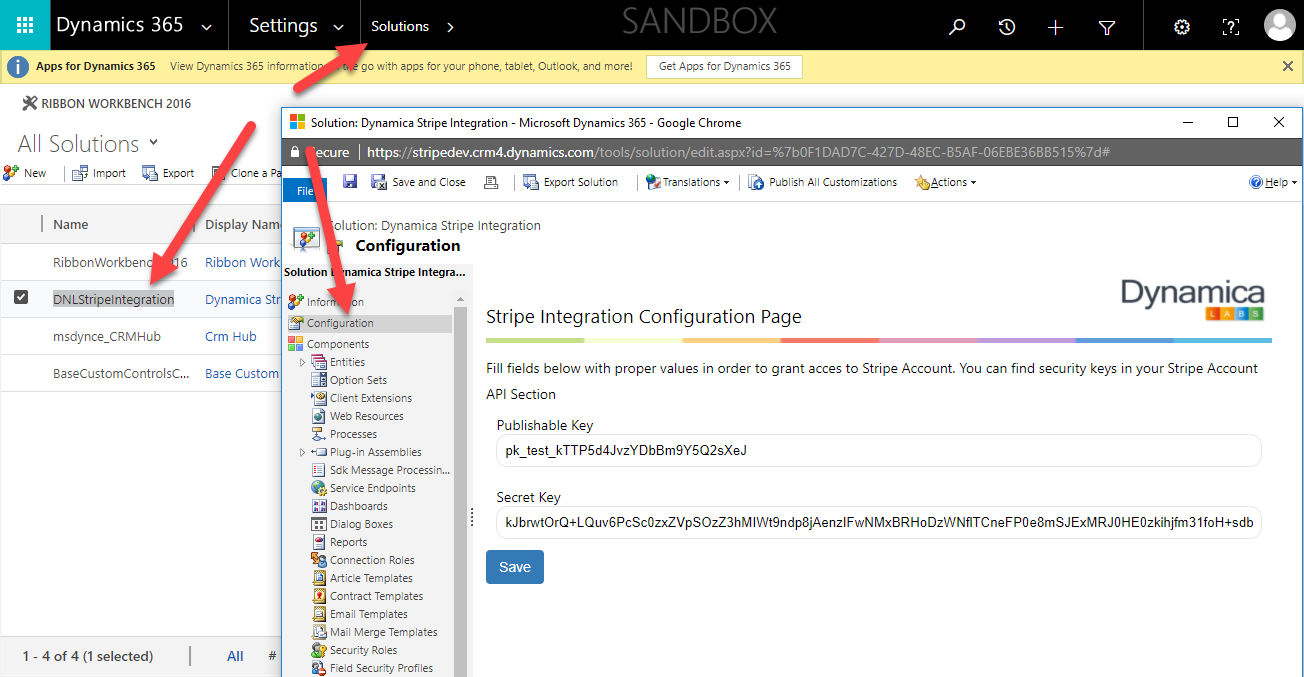
1. Go to <https://stripe.com> and click **“Dashboard”**.



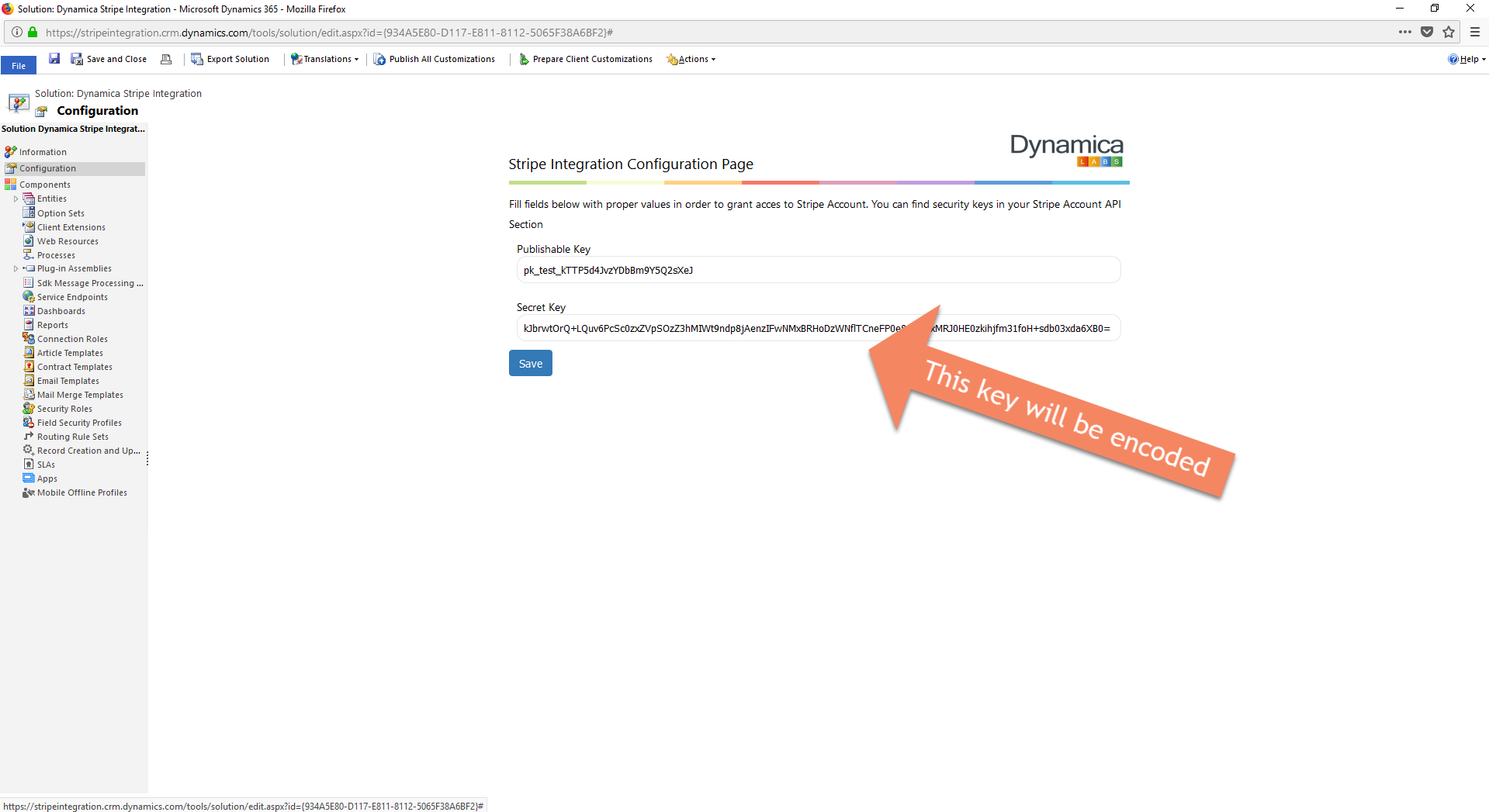
2. Find your **API keys** In the **API** section



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.



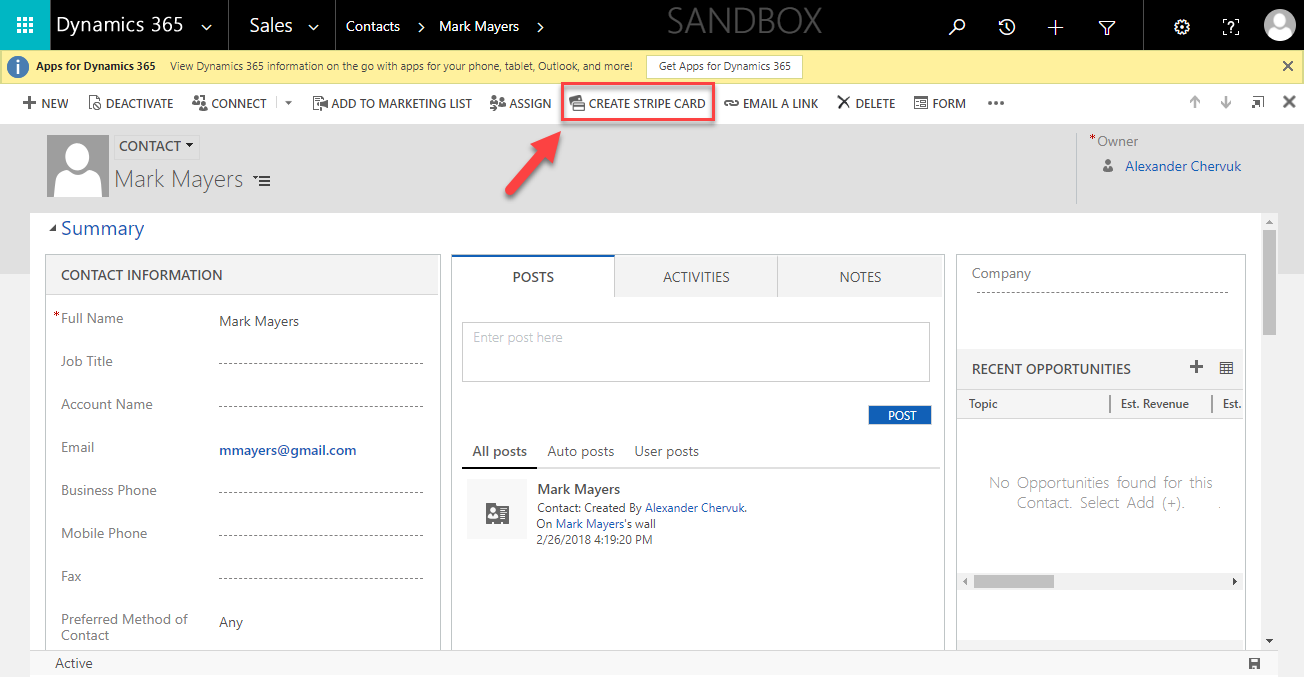
The configuration is done and the solution is ready to use.

# 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;



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

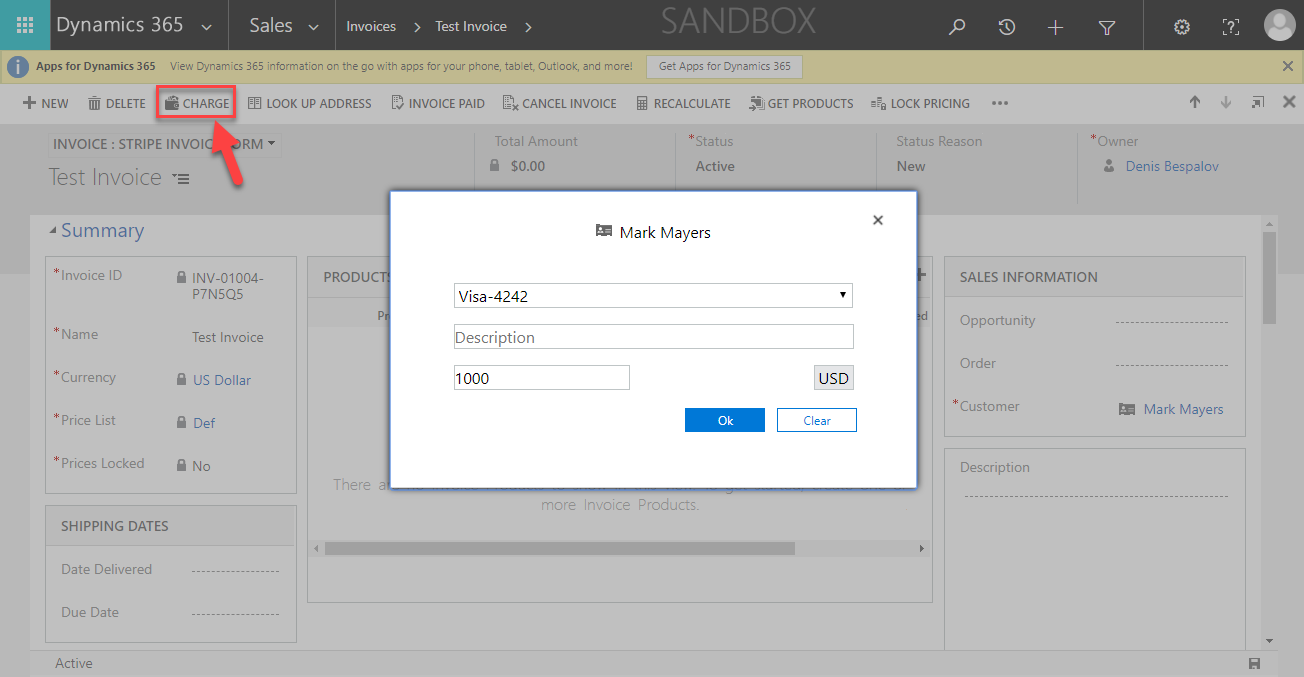
To charge a customer:

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;*



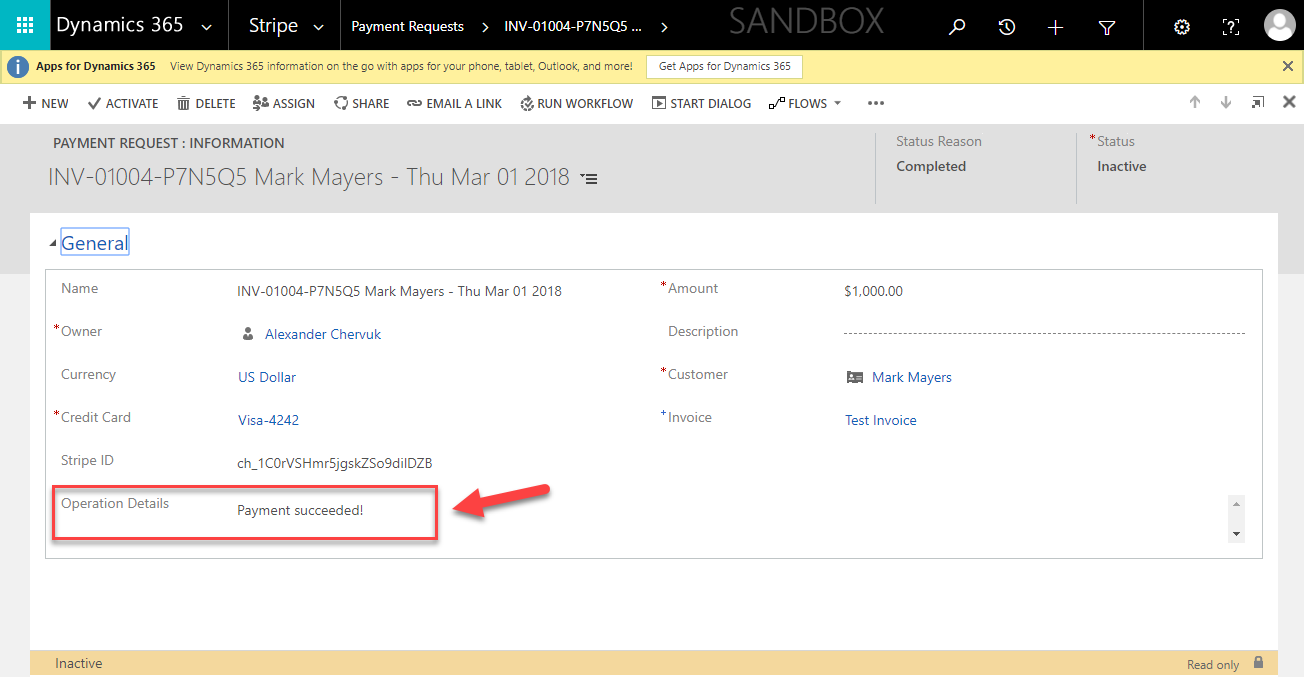
4. A **payment request** will be created. It may take some time to process the transaction.

## Track the Payment Request status

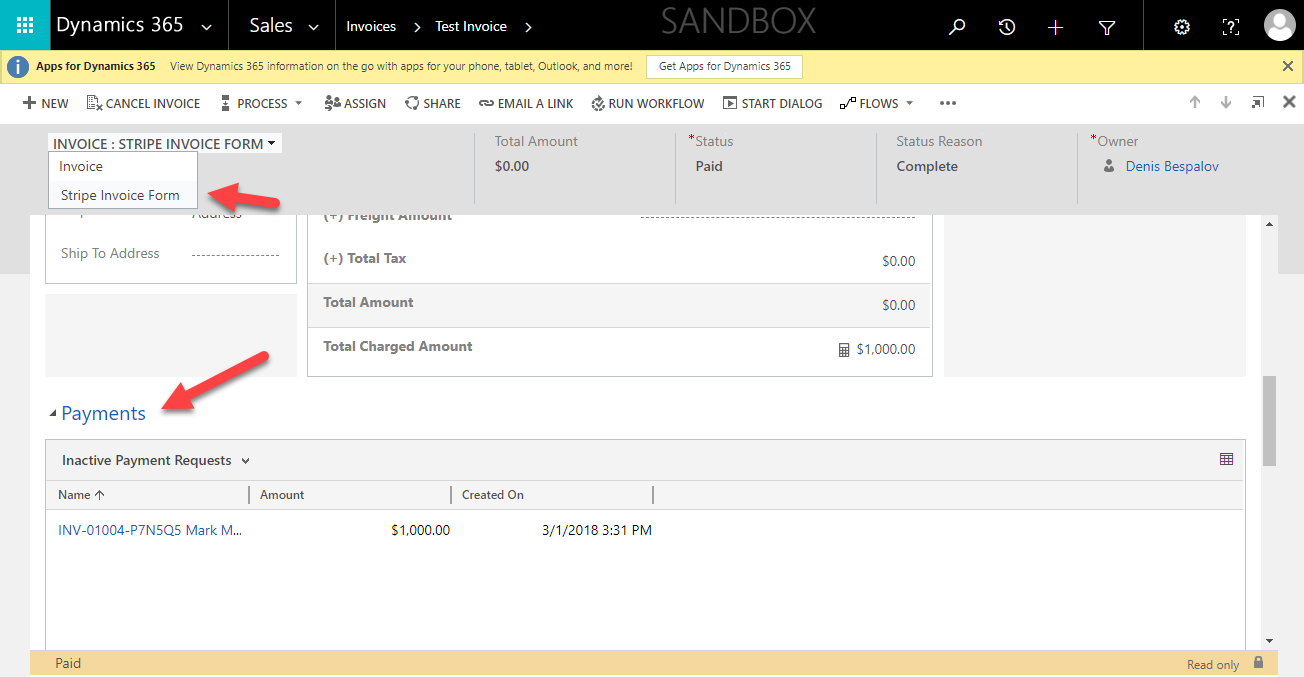
1. Find the **payment request** in payment requests view: **Stripe -> Payment Request**;

2. **Open** a **Payment Request** record;

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

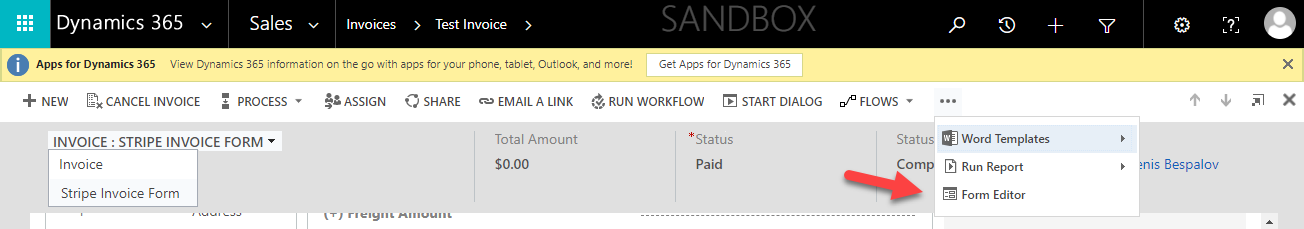


4. Payment requests associated with invoice can also be found on **Invoice –> Stripe Invoice Form** in **Payments sub-grid**;



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

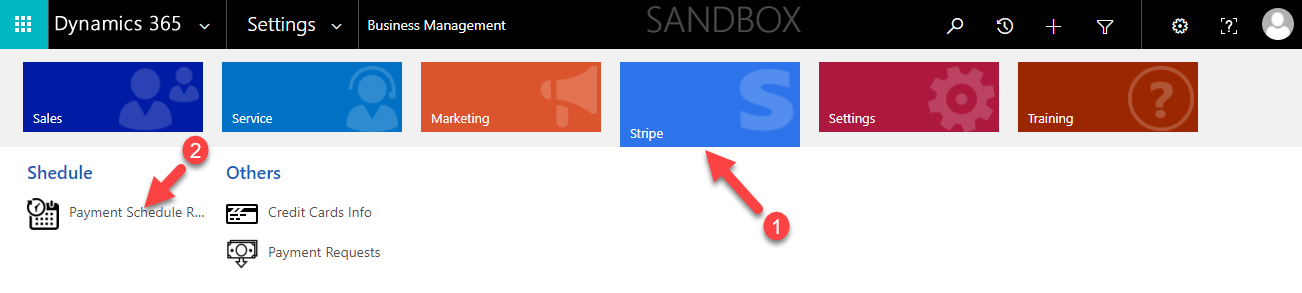
6. If you want to see the **Payments sub-grid** on any other form – add it with **Form Editor**.



# 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**;

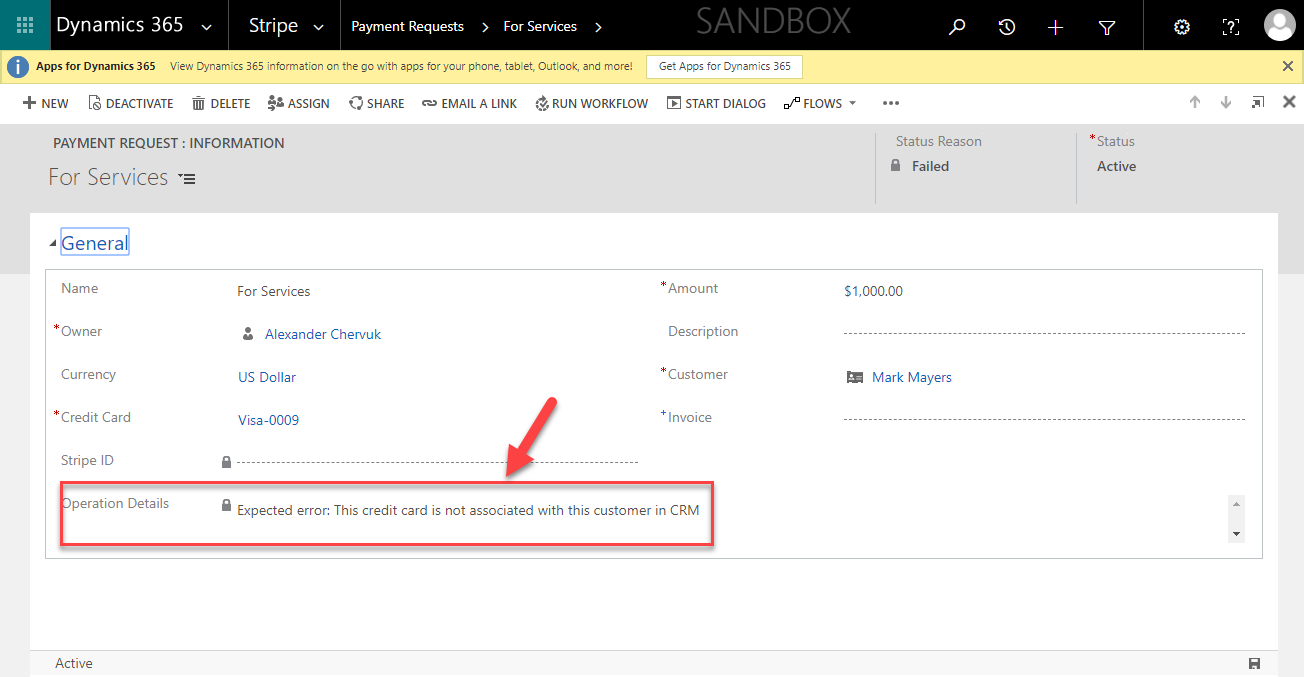
2. Click **New**;

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*



# 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;