

PAYMENT GATEWAY FOR DYNAMICS 365

TABLE OF CONTENTS

PAYMENT GATEWAY USER MANUAL 2

Set Up 2

Create a Customer (Account / Contact) Profile 5

Create a Transaction 6

PAYMENT GATEWAY USER MANUAL

Set Up

**Step One:**

To use our integration, go to **Settings > Payment Gateway > Configurations** and create a record of type Iframe. The URL will be provided by CRM Dynamics and will look something like this URL: [https://crmdpaymentgateway.azurewebsites.net/{ENVIRONMENT}.{VERSION}/](https://crmdpaymentgateway.azurewebsites.net/%7BENVIRONMENT%7D.%7BVERSION%7D/)







**Step 2:**

Sign into website by going to **Settings > Payment Gateway > Settings**. Authorize the website with your credentials. Note: Trial period lasts 30 days.



**Step 3:**

Sign into Merchant:

Go to **Settings > Payment Gateway > Configuration.** Create a record of type Authorize.NET Profile. A sample sandbox profile will be available by default to be signed in. You can sign into your merchant with API Client ID/ Transaction Key or via our Partner Account (OAuth 2.0). If you choose the latter, please contact CRM Dynamics for Client ID/Client Secret for PRODUCTION ENVIRONMENT. Multiple merchant profiles are supported so long as they are different currencies.





Create a Customer (Account / Contact) Profile

1. Go to **Sales > Account or Contact**


2. Use the Payment Gateway Form



1. Account Type/Contact Type must be “Client” for the Authorize.NET tab to appear.



1. Add Payment Profile(s)



Create a Transaction

Authorize Payment Type can be a One Time Payment or Refund.



