

PAYMENT GATEWAY PREMIUM FOR DYNAMICS 365

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PAYMENT GATEWAY PREMIUM 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

**Step One:**

Go to **Sales > Account or Contact**



**Step Two:**

Use the Payment Gateway Form



**Step 3:**

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



**Step 4:**

Add Payment Profile(s)



Create an Invoice

**Step One:**

Go to **Contacts > New > Contact Type = Client** then hit save. Make sure you are using the Payment Gateway contact form.



**Step 2:**

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

**Go to Contacts > Choose your contact you saved previously > Create New Invoice**



**Step 3:**

Fill in all the information you need for the invoice:



**Step 4:**

For a Recurring Payment: **Open the Invoice you created in the last step** **and scroll down to the Authorize.NET area of the form.**

* The Start Date must be on or after Today. The End Date can be ongoing (Empty) or a date after the Start Date. Authorize.NET will calculate the number of occurrences automatically.
* The Interval Period is defined with a Unit (Days/Months) and Length (Quantity)
* Optional Trial periods will precede the defined interval. First three months free will be Trial Amount of Zero with Trial Occurrences of 3.
* Authorize.NET will apply the transaction and an Invoice representing that Transaction will populate
* Subscriptions can be cancelled at any time.



Make sure the Invoice form being used is for Payment Gateway:



