MTC Management Technology Consulting LLC

Microsoft Dynamics CRM / XRM Platform

Order Credit Card Processing For Microsoft Dynamics CRM

User Guide

Microsoft Dynamics CRM

CRM Versions Supported:
CRM 2011/2013/2015/2016

In association with Authorize.net the process of capturing Credit Card Details with high security made possible in Microsoft Dynamics CRM. Processing credit card payment made easy and quicker. 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. Processing credit card payment made easy and quicker. 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. This product also supports to make refunds to Accounts or Contacts if the Payments are received.

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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 requesting license key to **salesteam@mtccrm.com** with your **Organization Unique Name.**

- To access your Organization Unique Name Click on **Settings→Customizations→Developer resources** as shown

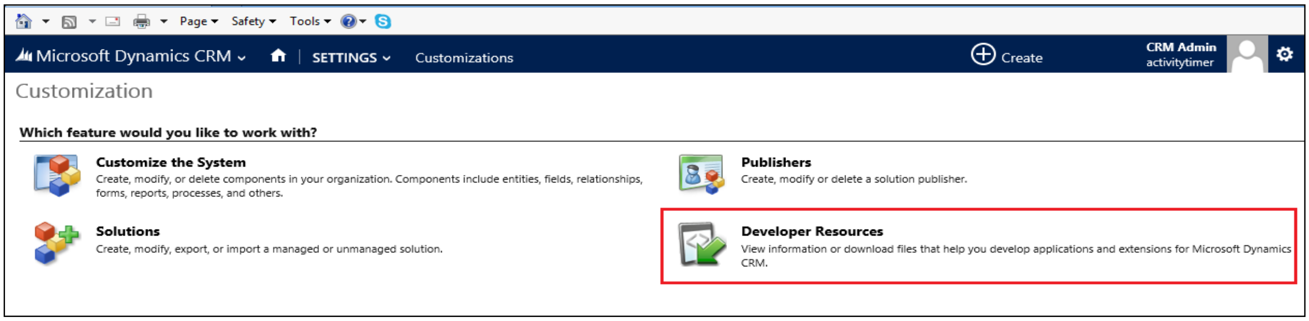


Figure 1 : Developer Resources

- A window will pop up with Organization Unique Name as shown below.

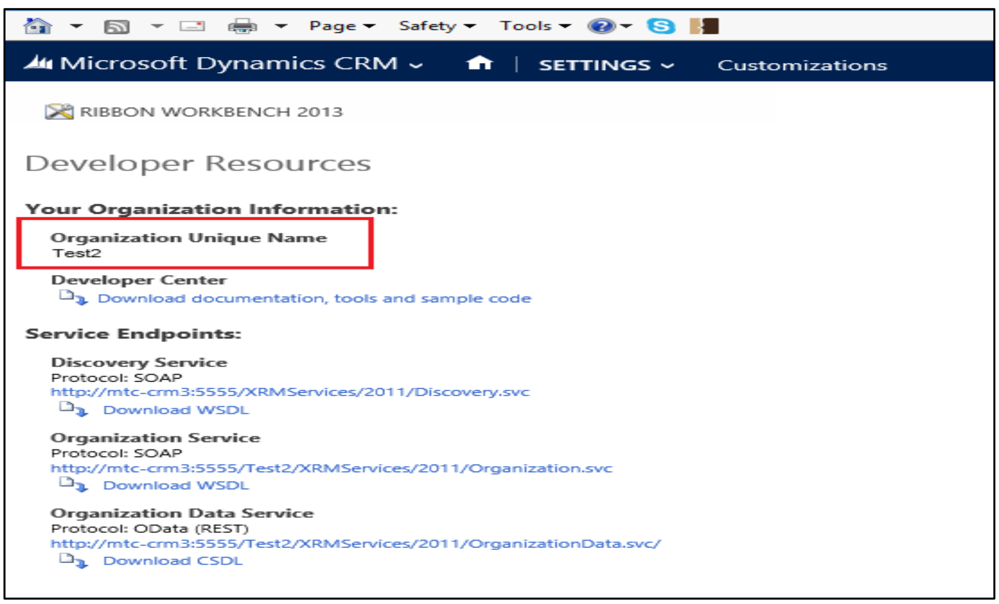


Figure 2 : Organization Unique Name

- Send this Organization Unique Name through Email and you will receive your Licensing Key within 24 hours.

NOTE: After placing the request you will receive the LICENSE KEY within 24 hrs.

Installation Process

To install the Credit Card Processing solution for Microsoft CRM the following steps are to be followed.

STEP 1:

- Go to http://www.mtccrm.com/CC.aspx click on Download Credit Card for Microsoft CRM

STEP 2:

- On Downloading you will get MTC CreditCardProcessing.zip (ZIP file).
- Extract the files from the downloaded folder. You will get two WINRAR ZIP files.

MTC_CreditCardProcessing.20152016.062016.0.8.managed.zip

Licensing.20152016.062016.0.8.managed.zip

NOTE: The Credit Card Processing Solution has to be imported into CRM for installation

STEP 3:

- Open your CRM click on **Settings→Solution→Import** it will open import Solution window.

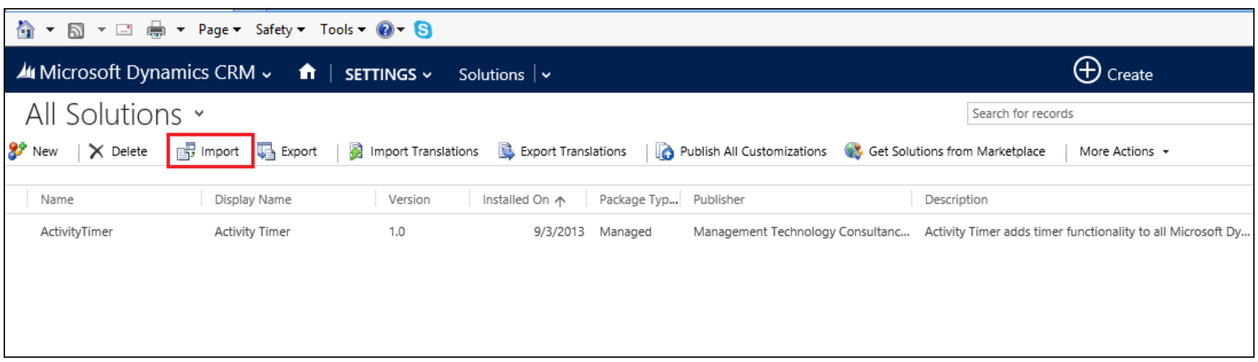


Figure 3: To Import Solution

- In Import Solution Window you can **browse** and Select Solution Package zip file and then click on **Next** for further processing.
- **Firstly, user needs to Import Licensing Solution and then Secondly import the Credit Card Solution.**

Installing Licensing Solution

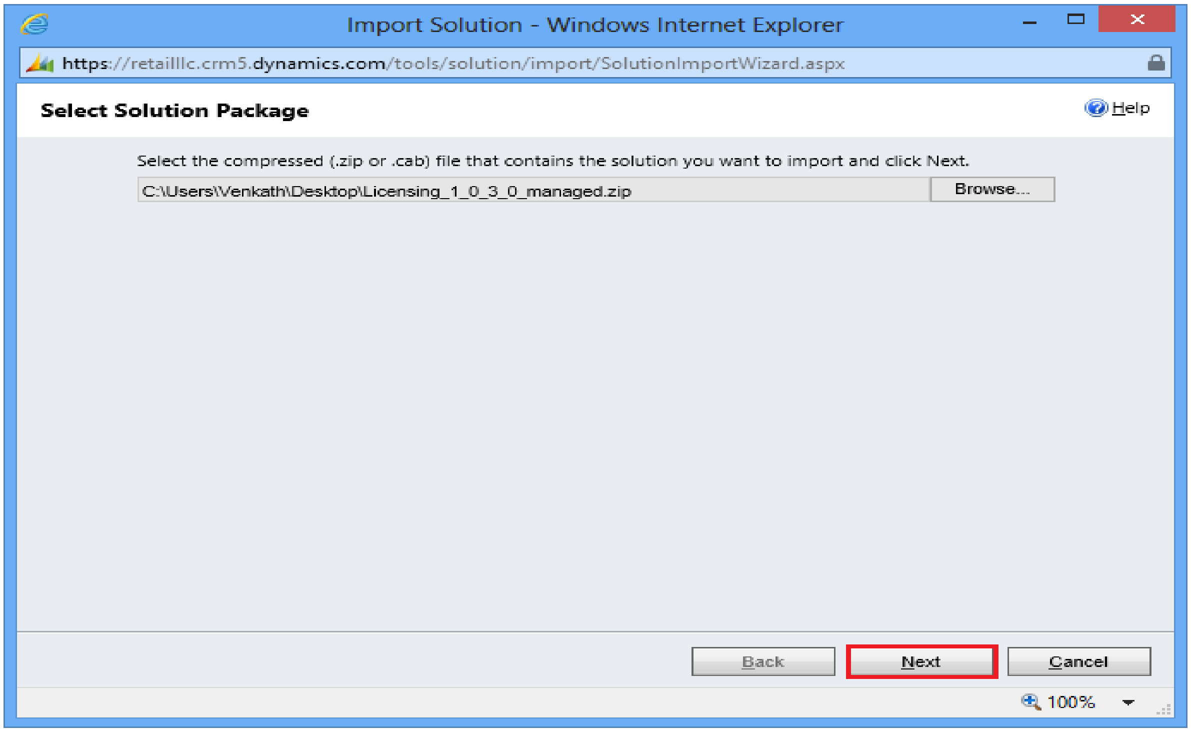


Figure 4: Select Solution Package

- In Import Solution Window you can browse and Select Solution Package zip file and then click on Next for further processing.

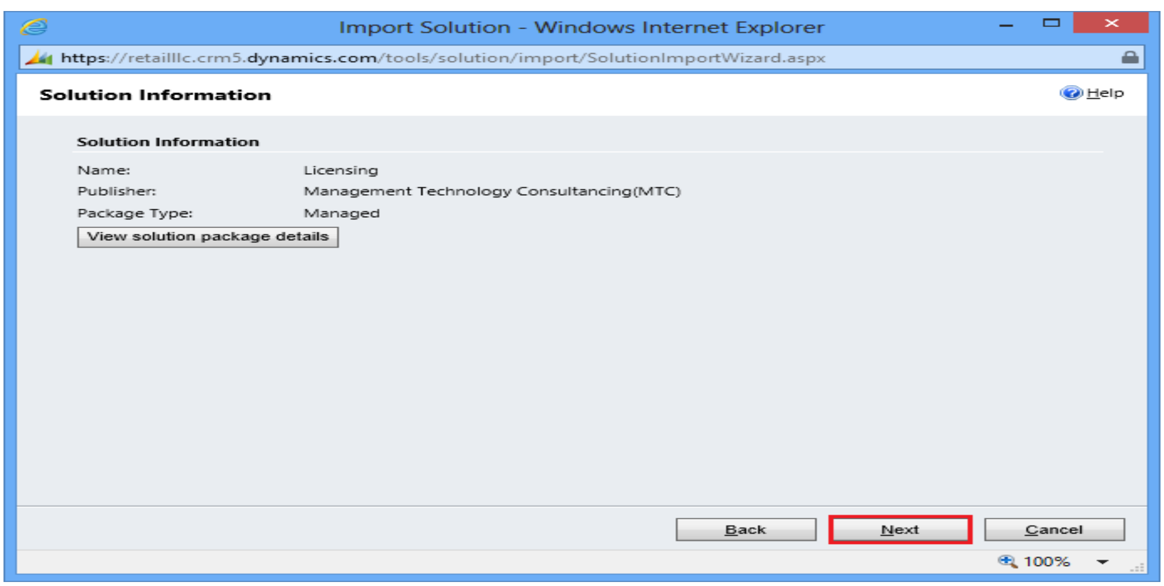


Figure 5: Solution Information

- Click on Next to proceed

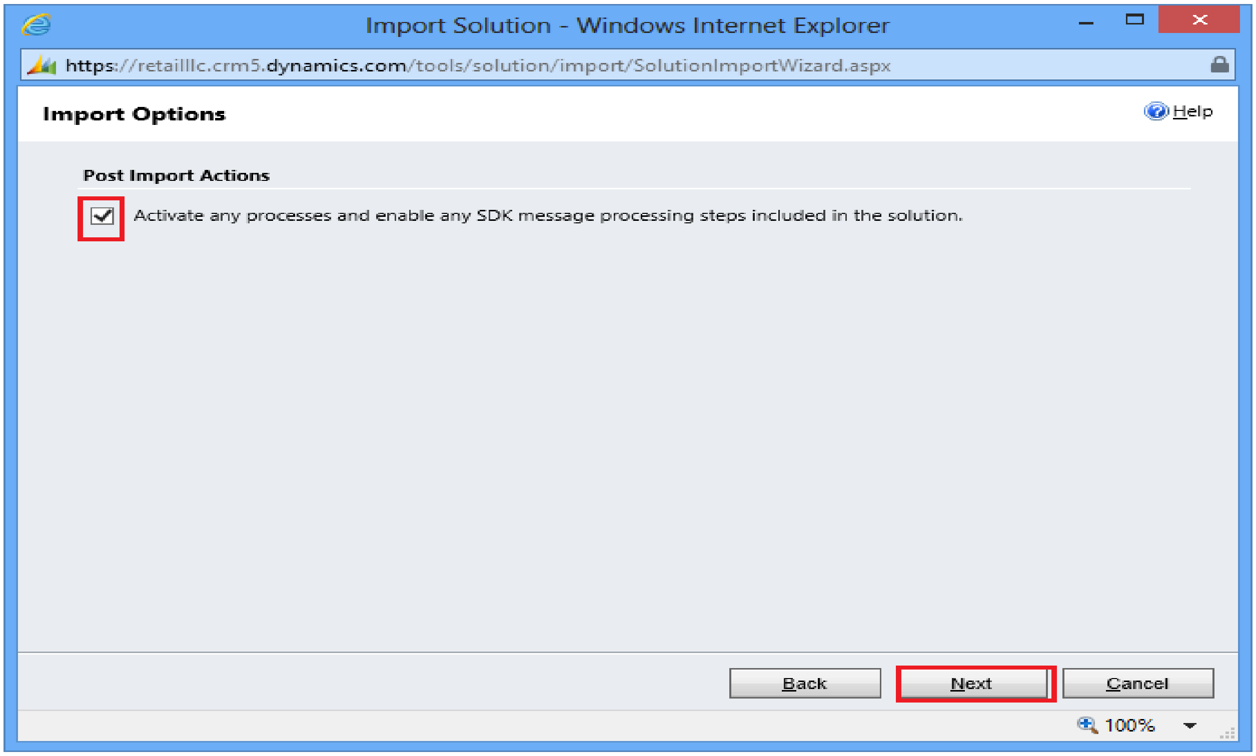
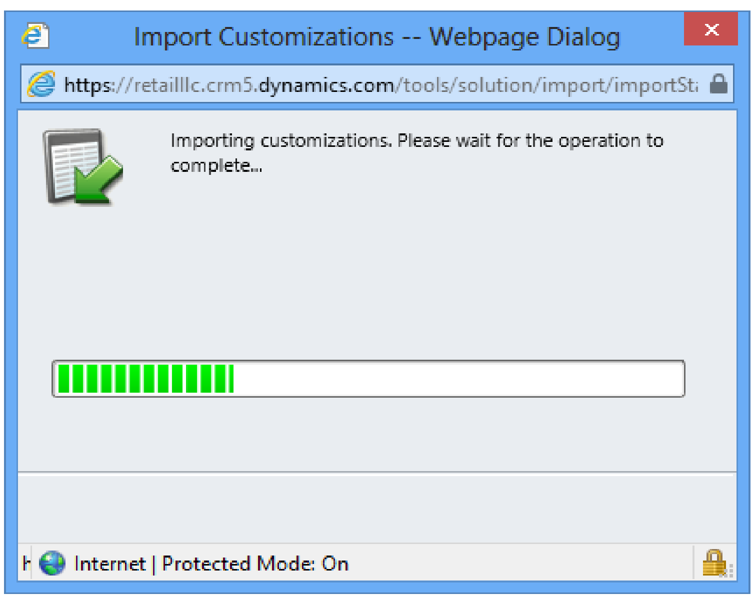


Figure 6: Import Option

- Click on Next to proceed



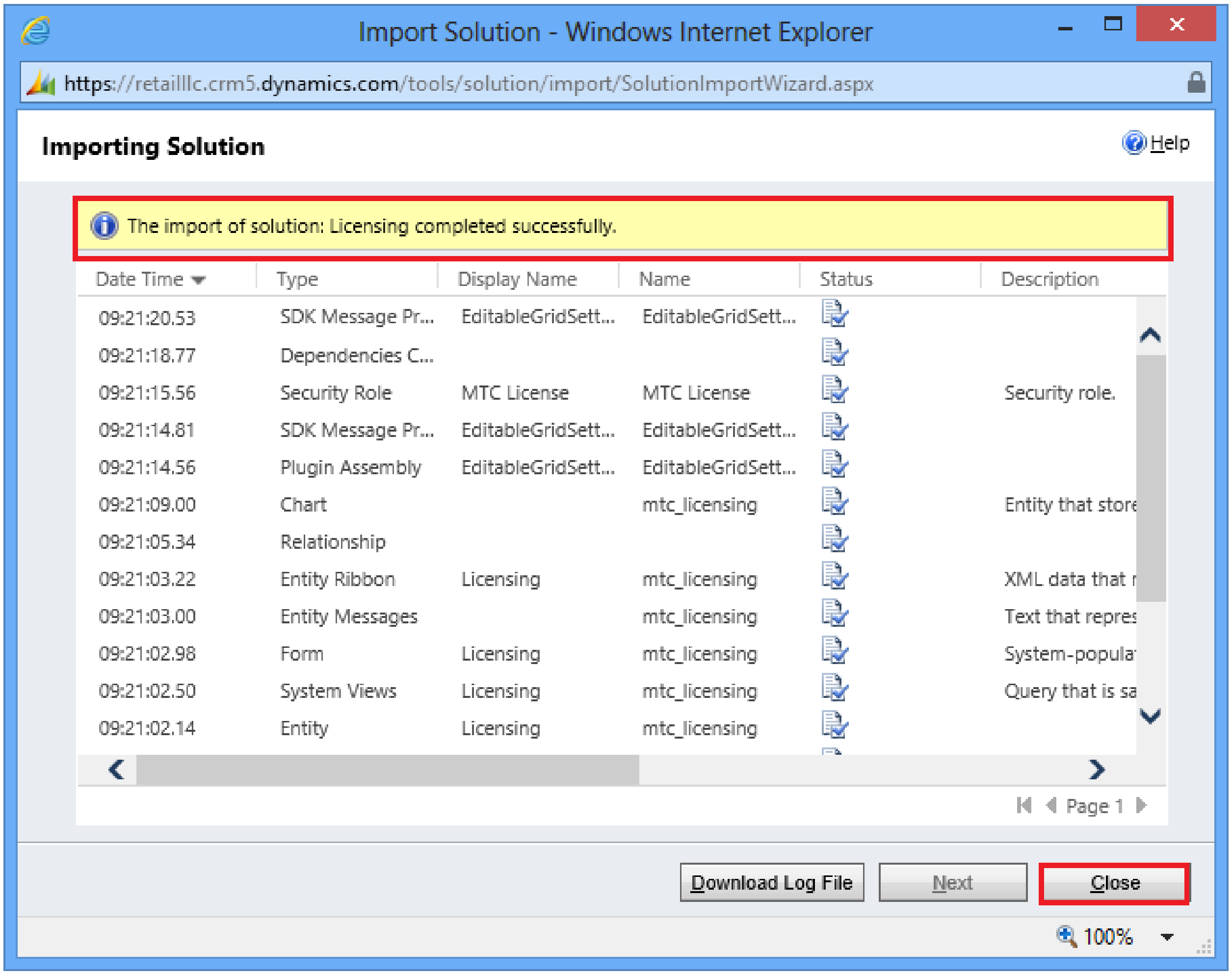
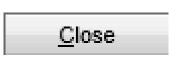


Figure 7: Importing Solution - Licensing

- Click on  after successful completion message is displayed.

Installing Credit Card Processing Solution

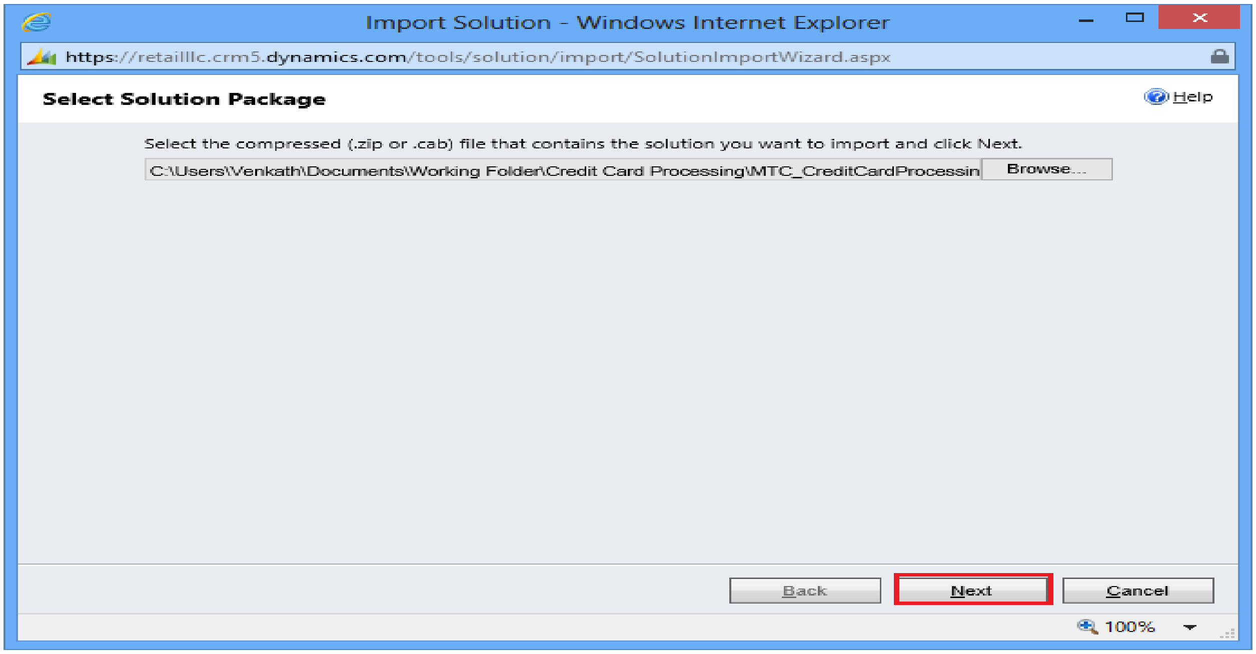


Figure 8: Select Solution Package – Credit Card

- Click on Next to proceed.

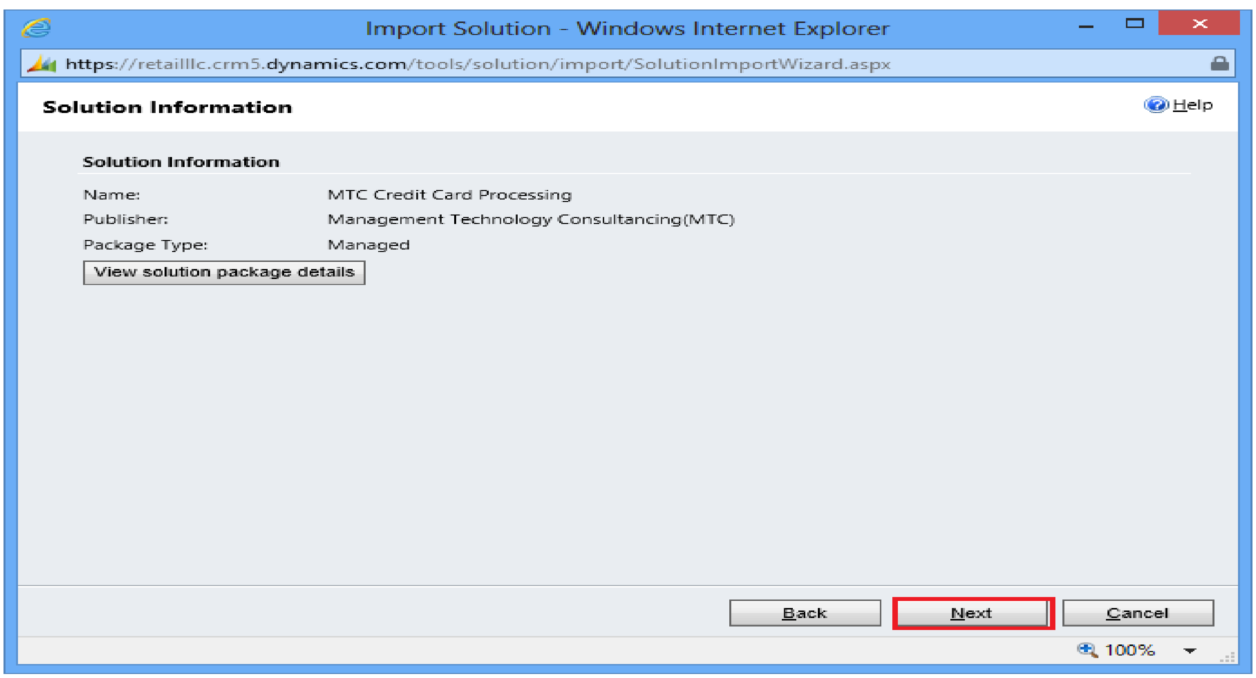


Figure 9: Solution Information

- Click on Next to proceed.

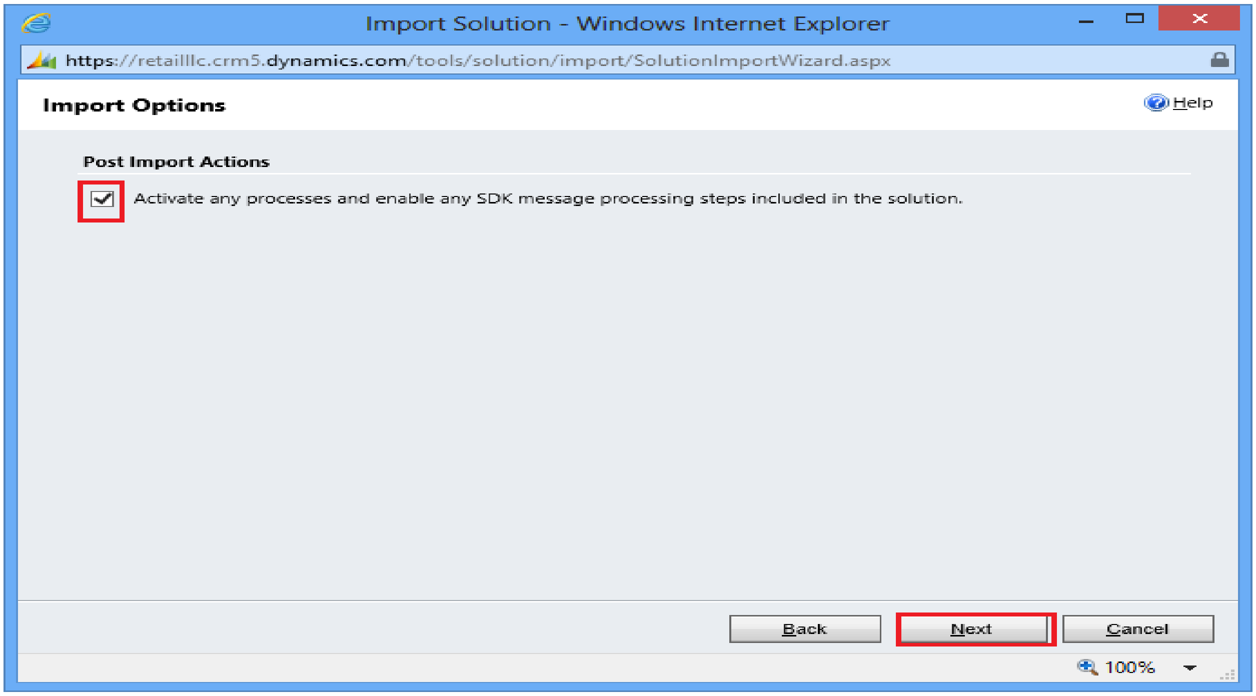
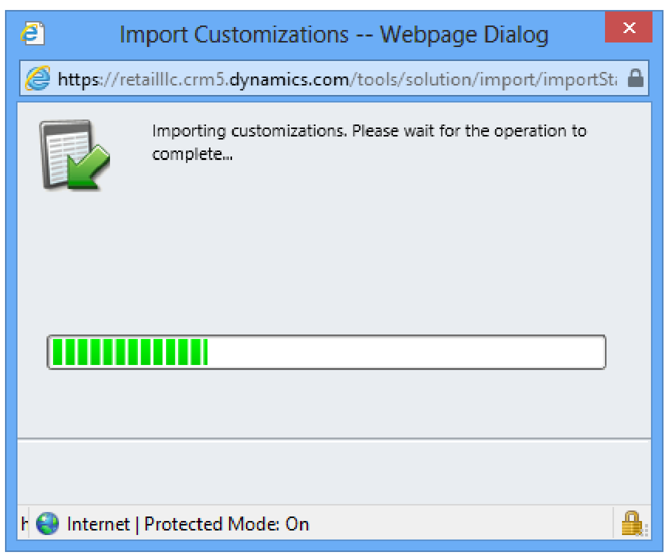


Figure 10: Import Option – credit card

- Click on Next to proceed.



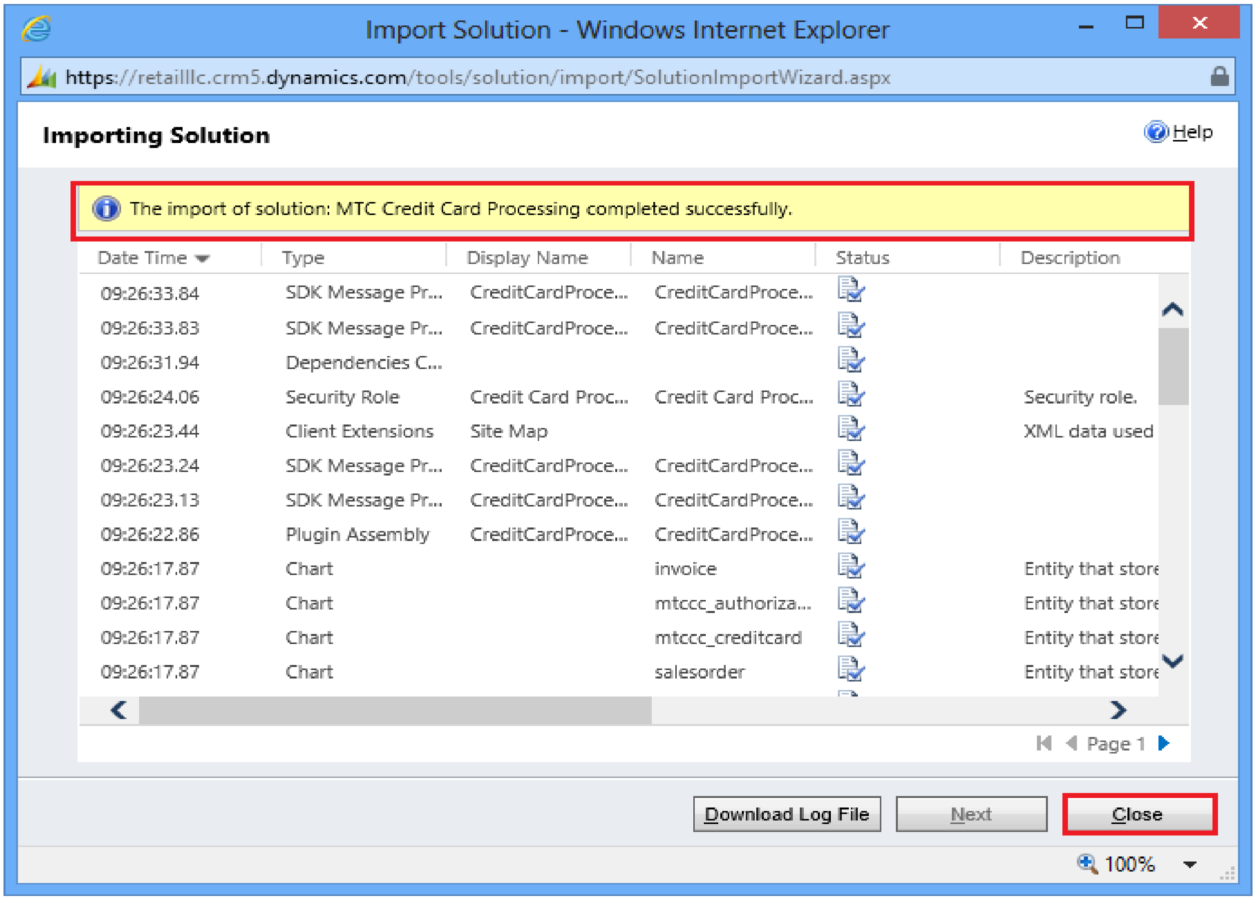
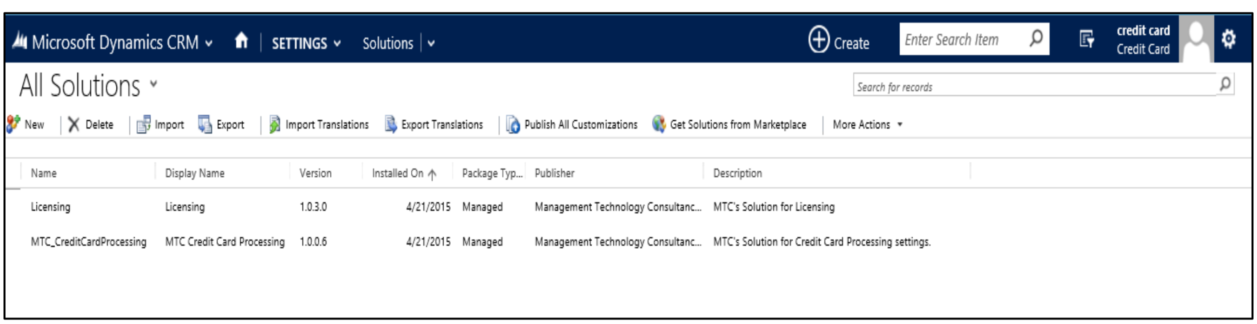


Figure 11: Importing Solution - Credit Card

- Click on Close after successful completion message is displayed and the CRM will have both the solutions as shown below



Activating License Key

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

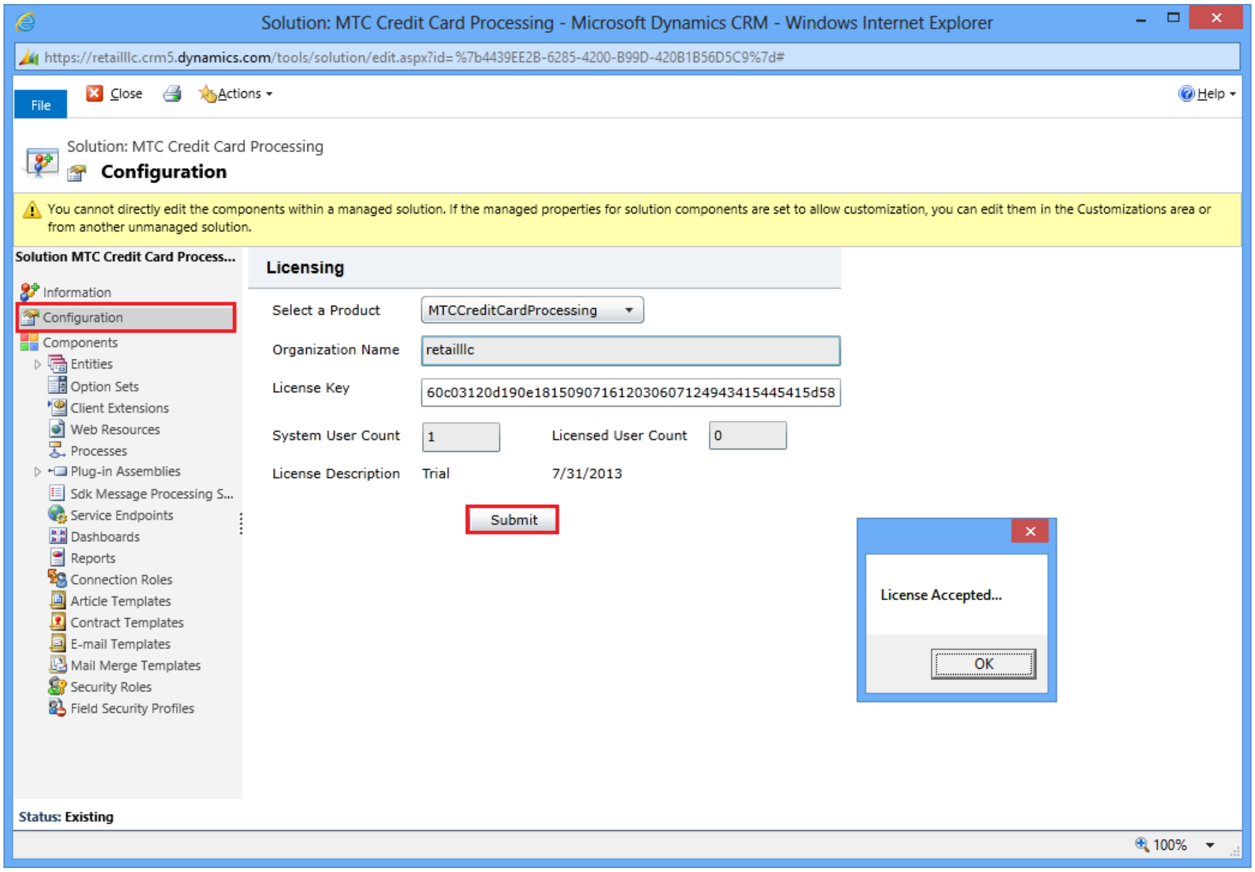


Figure 12: License Key for Credit Card

- 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/

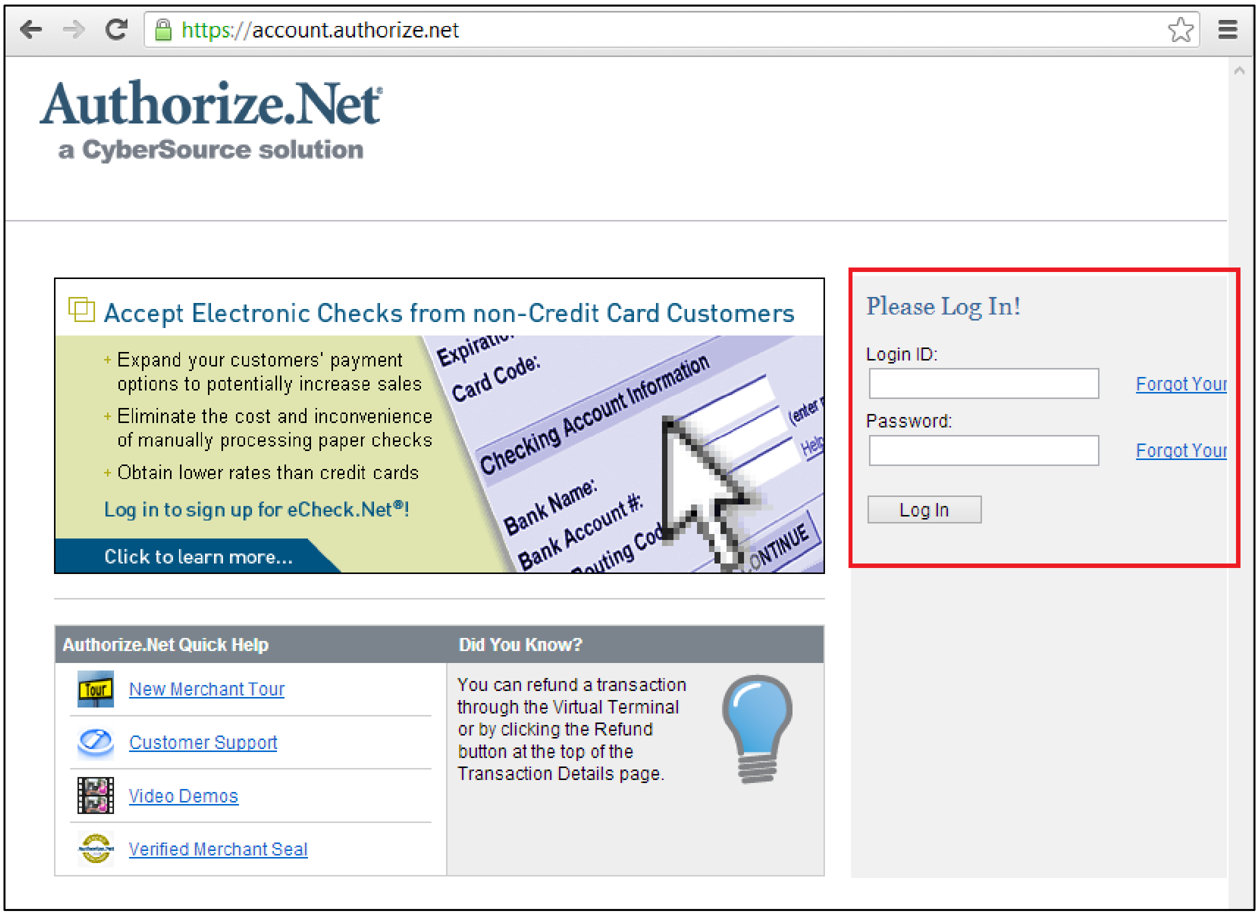


Figure 13: Authorize.net Merchant Login Screen

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

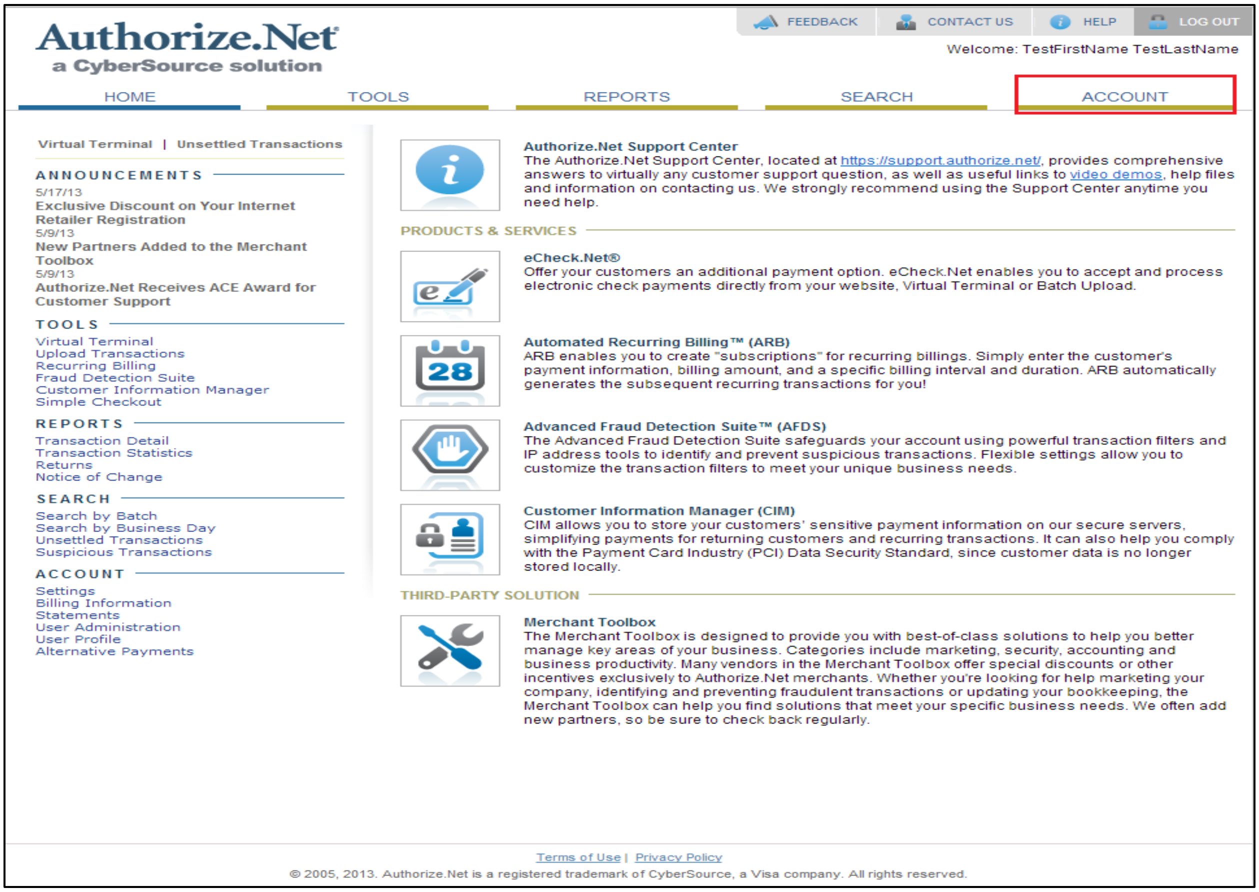


Figure 14: Authorize.net - Select Account

- One the Setting screen is opened click on API Login ID and Transaction key as shown below

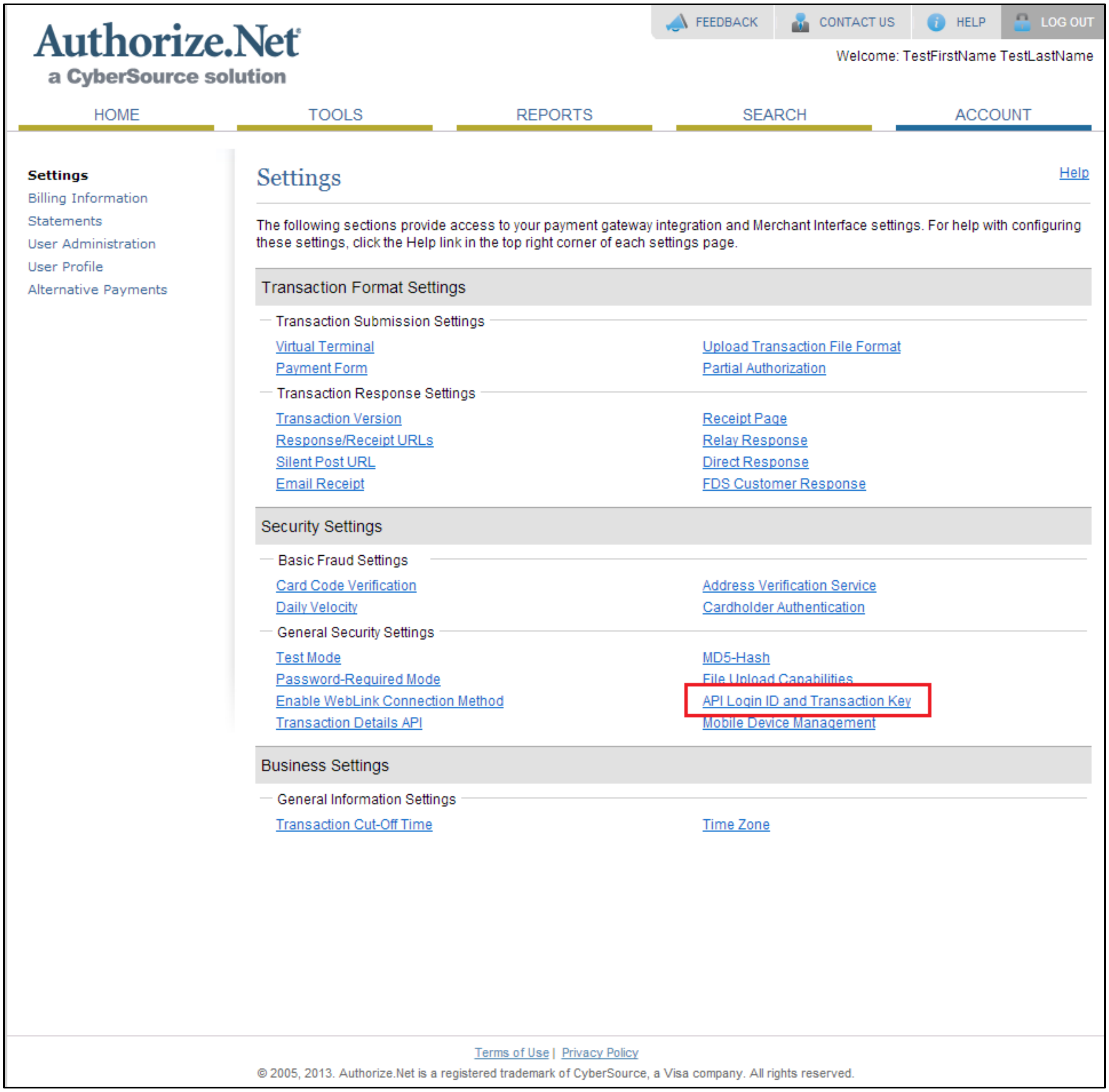


Figure 15: Authorise.net – Select API Login and Transaction Key

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

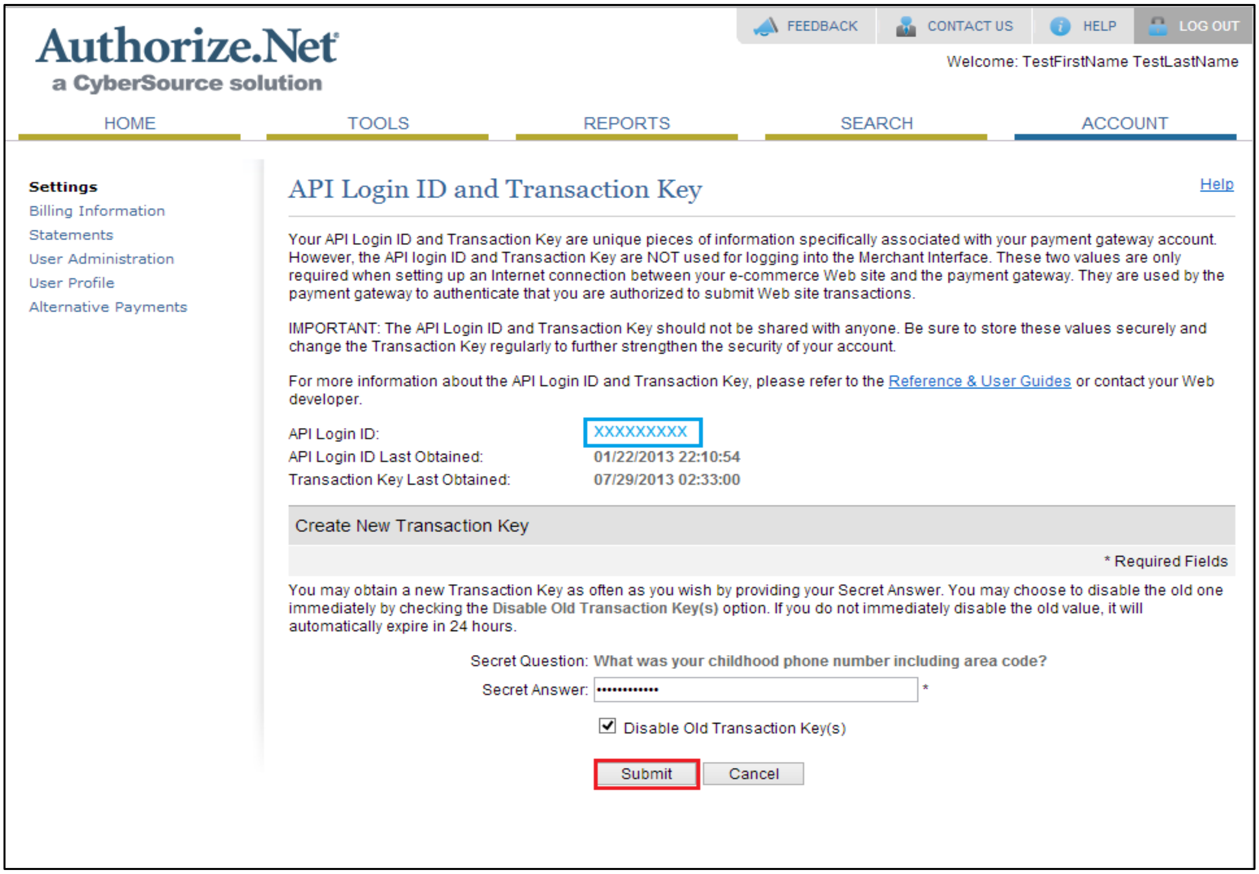


Figure 16: API Login and Transaction Key

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

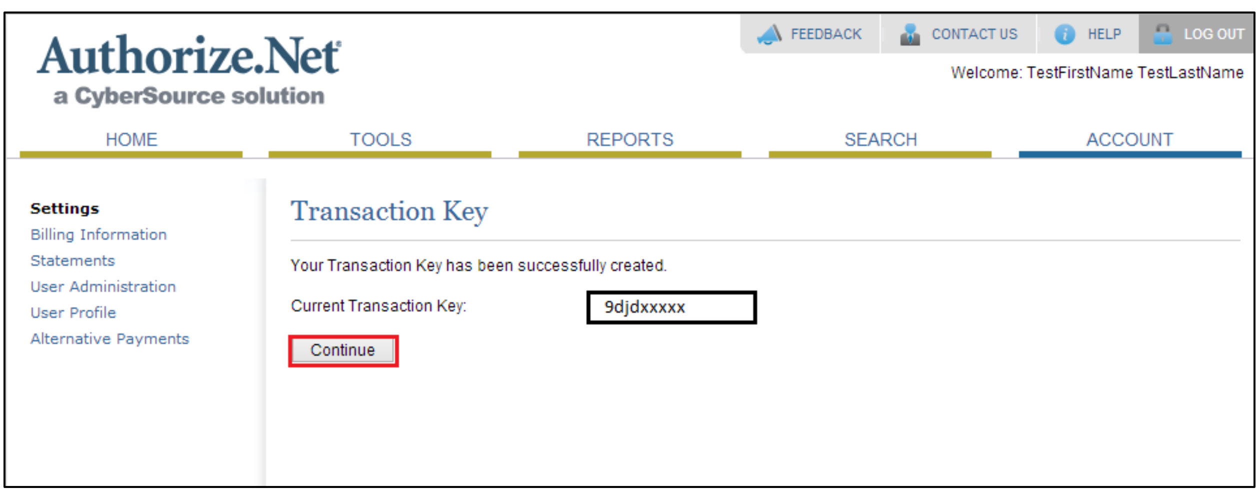
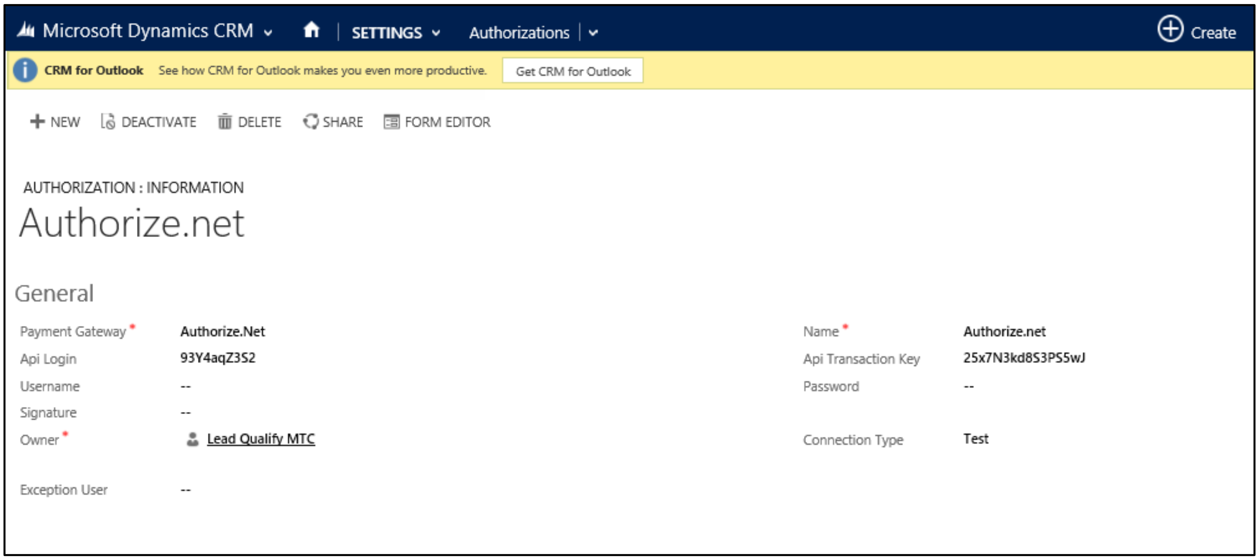


Figure 17: Transaction Key - Authorize.net

- Click on Continue
- Store and Record API Login ID and Transaction Key details
- Now Go to **CRM->Settings-> Authorizations**
- For the first time create a New Record Authorize.net or PayPal as shown below



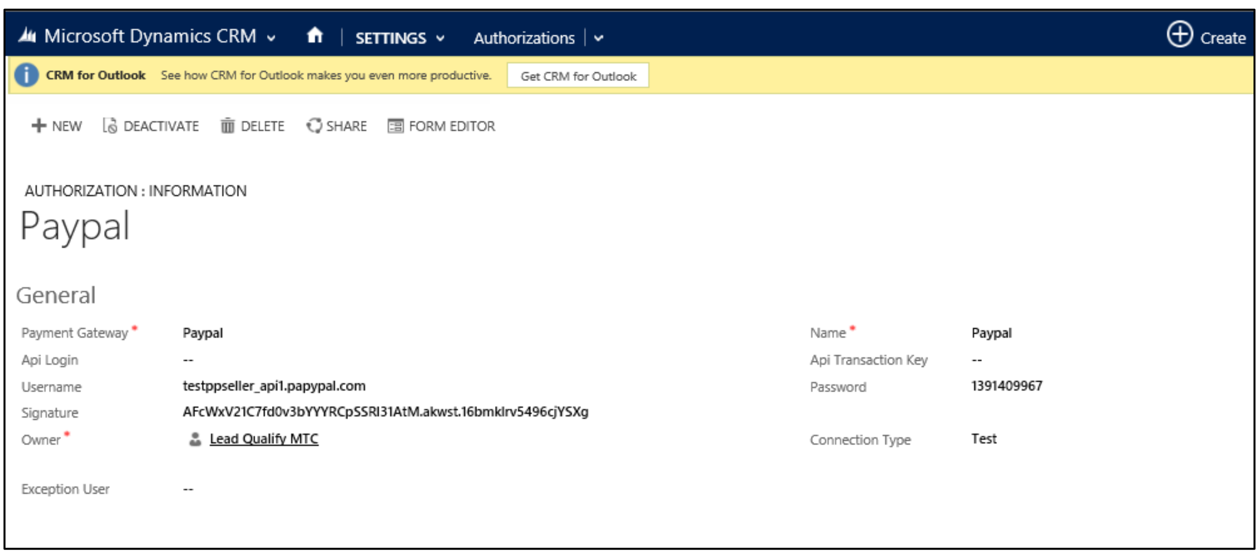


Figure 18: CRM form to create Authorization

- On Creating the records you will view the

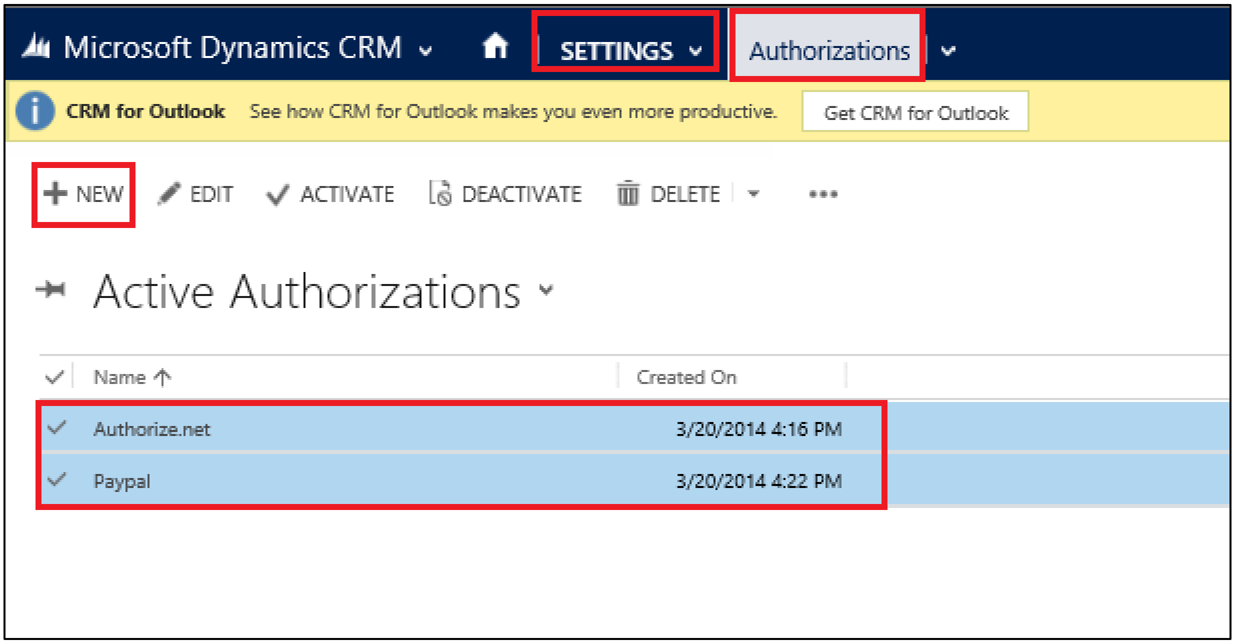


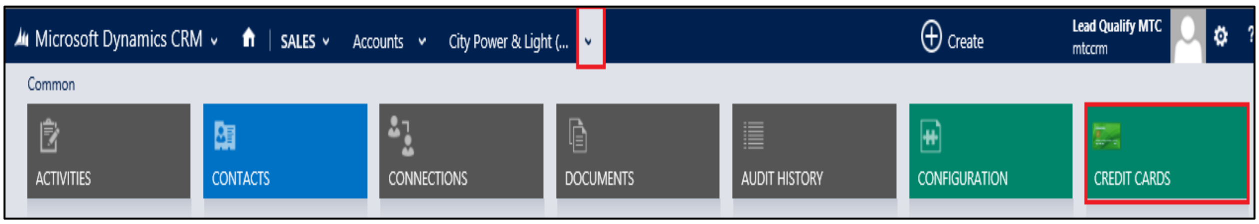
Figure 19: CRM screen - Storing API Login details

- Copy the API Login and API Transaction Key click on Save & Close to continue

Procedure to add Credit Card or PayPal to customer

Once the record is saved, the credit card number is masked and the cvv 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
- To add Credit Card information click on Credit Card as shown below (same for PayPal also)



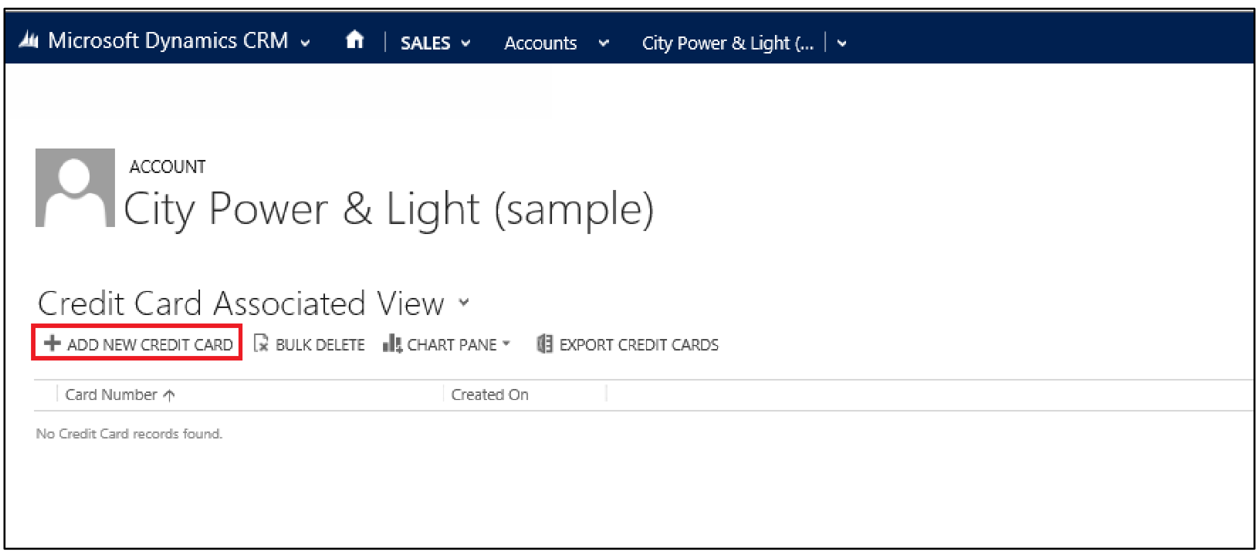


Figure 20: CRM Account form

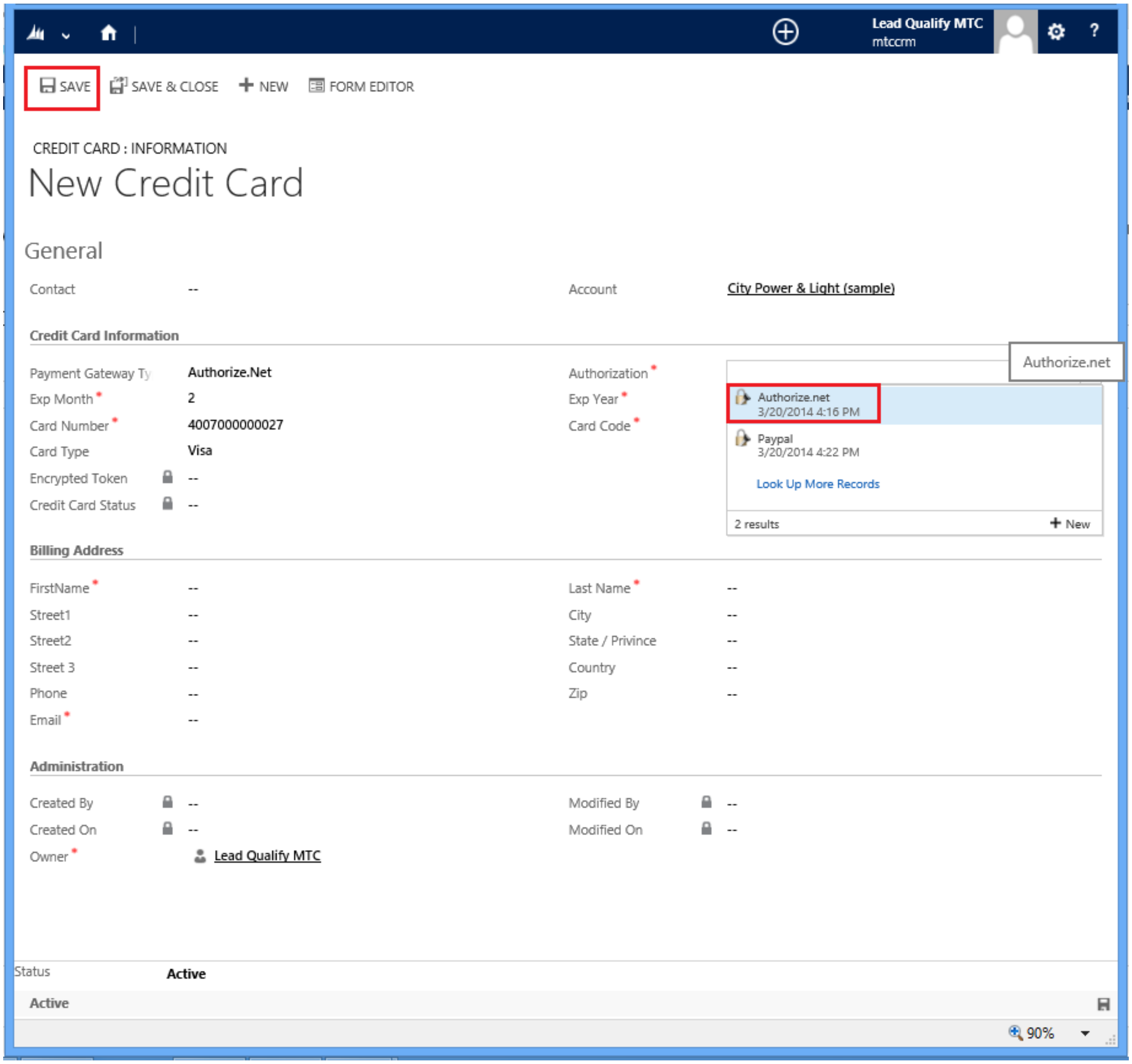


Figure 21: CRM Account showing Credit Card view

- Select Add New Credit Card button on the top ribbon as shown above
- 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.
- Click on Save button which is on top left corner of the form.

- 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 stored in the CRM as shown below.

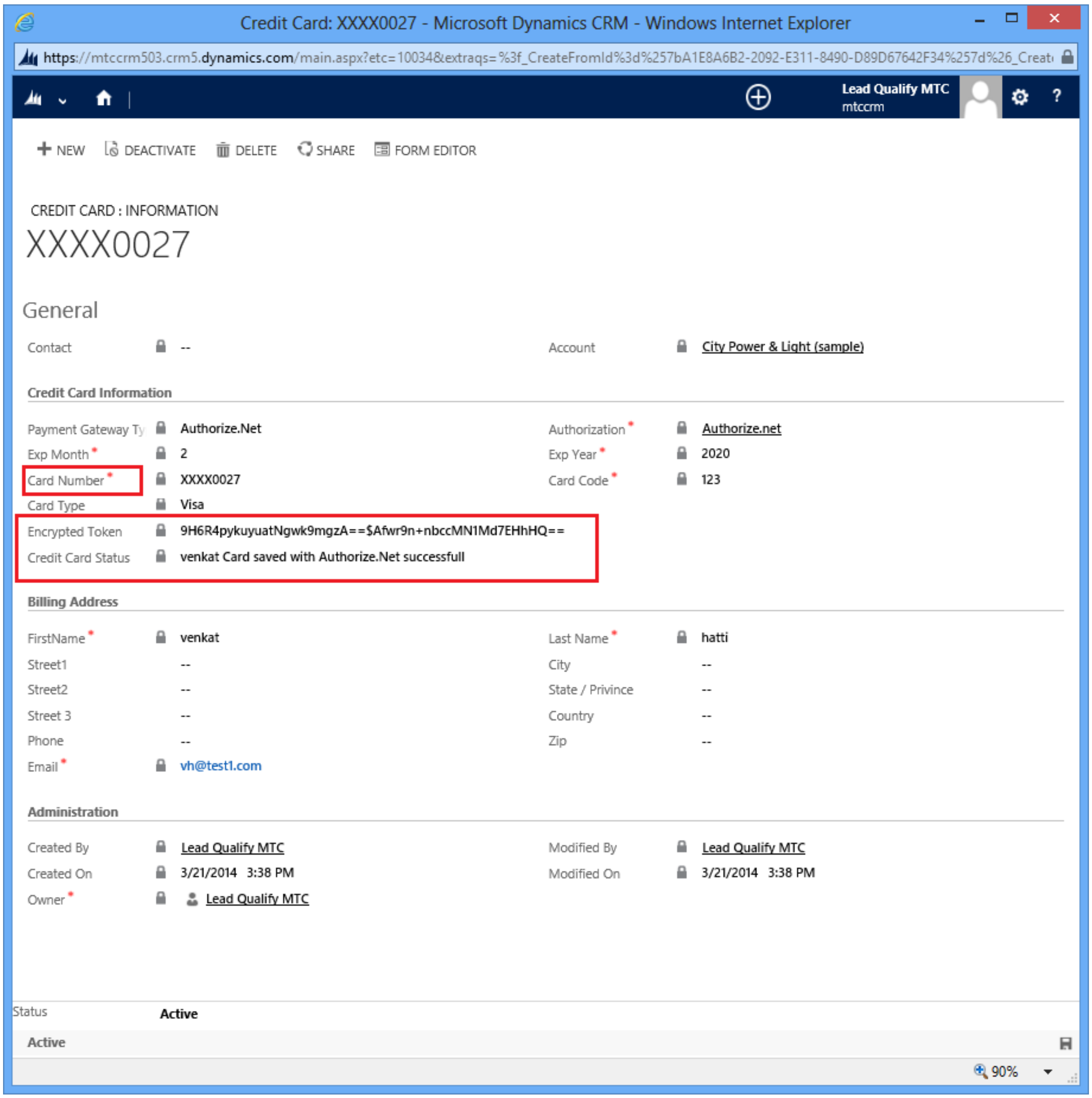
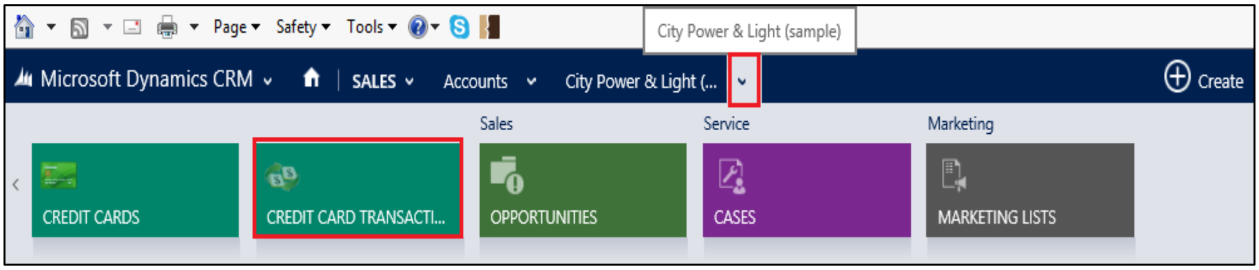


Figure 22: Encrypted values stored in CRM

Credit Card Processing

- Go to **CRM->Sales_>Account->Customer-> >Credit Card Transaction**



- Click on Credit Card Transaction as to create a new transaction as shown

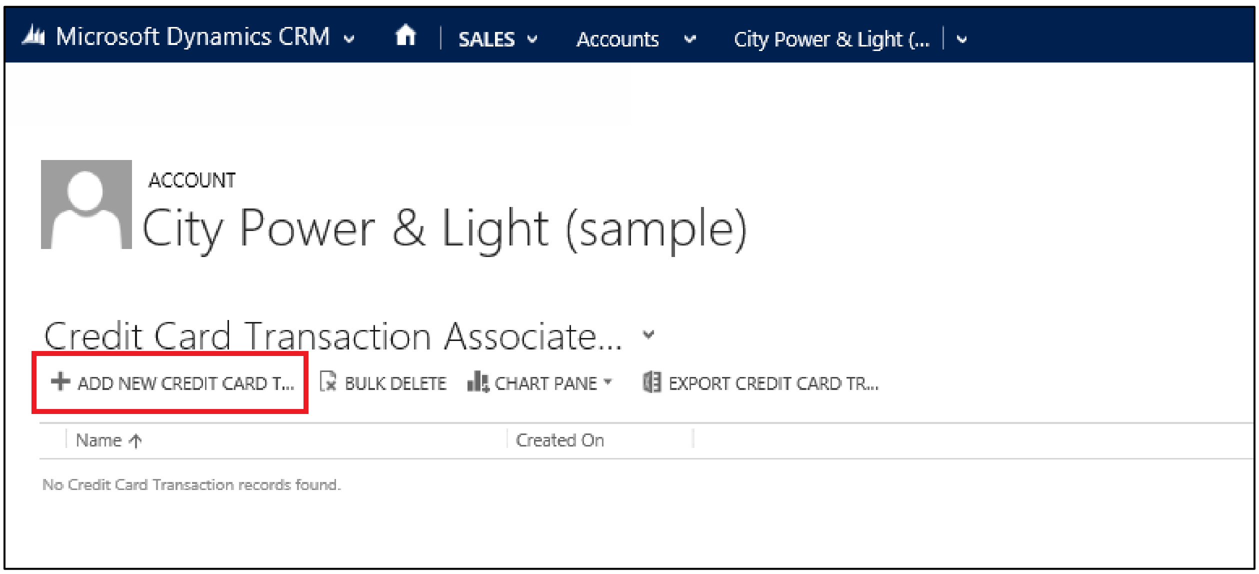


Figure 23: Add New Credit Card details

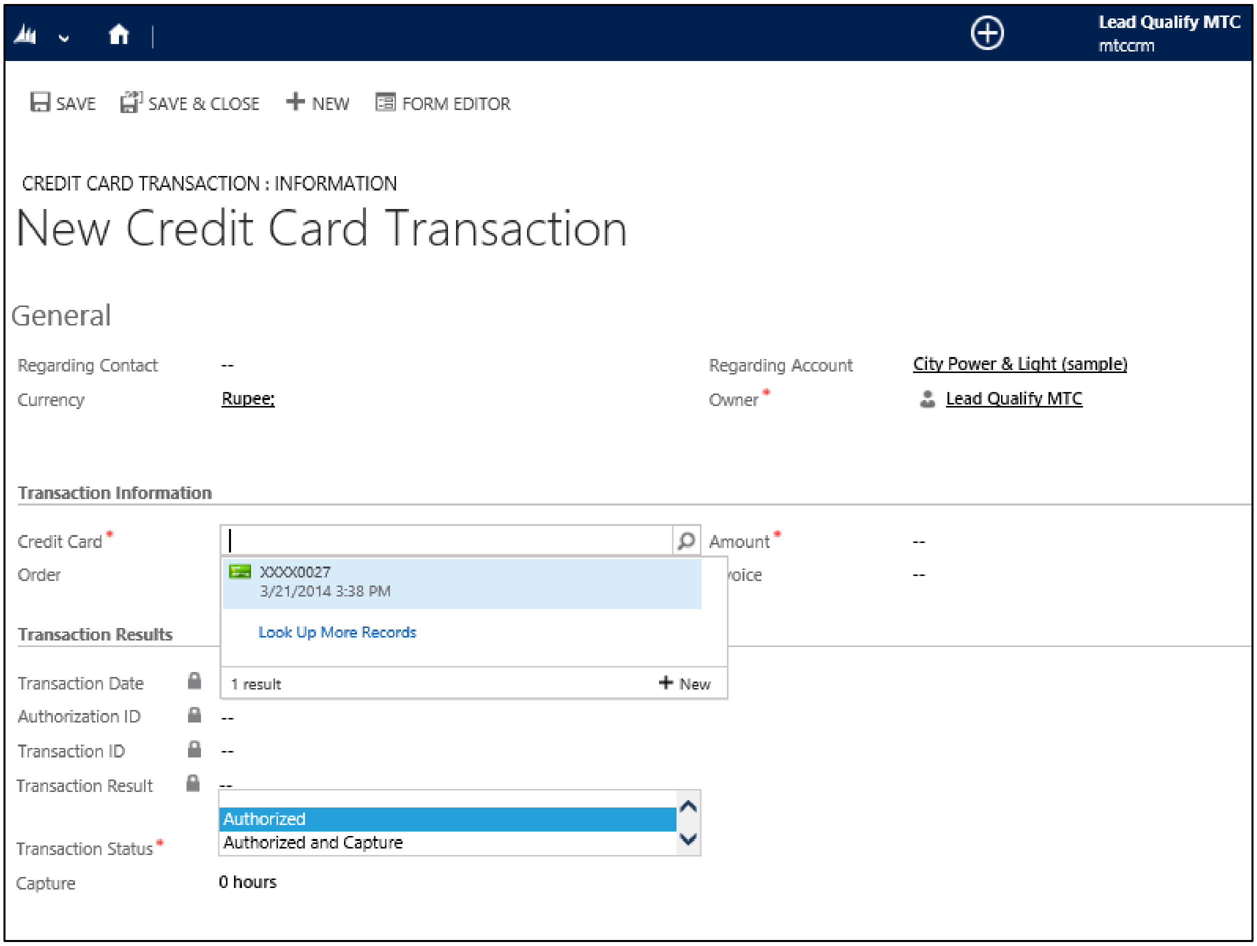


Figure 24: Credit Card transaction Details

- 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 Results are displayed
- The Transaction details are updated and the results are updated as "**The transaction has been approved**" (only if the transaction passes thru the payment gateway)

NOTE: In Transaction Status you have 2 options **Authorized and other Authorized and capture**

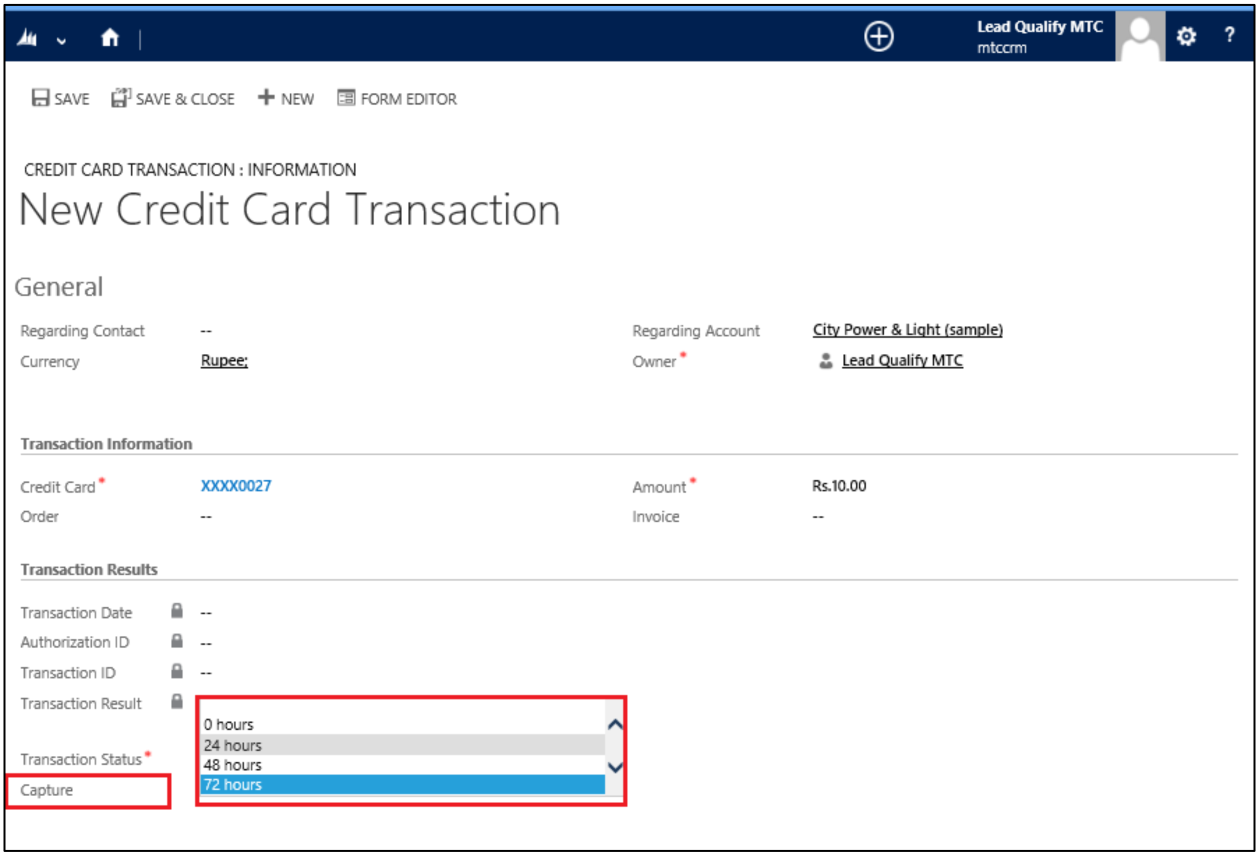


Figure 25: Credit Card transaction Status Details

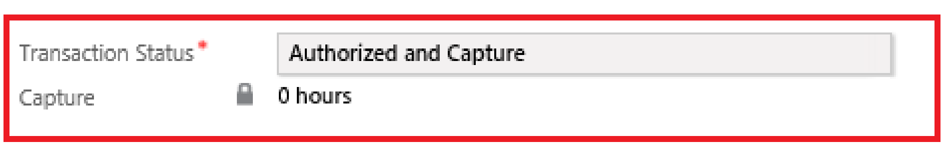
- **If Transaction Status is Authorized**

  The Capture field below is activated and a drop down is provided as shown above

  You can select from 0 hours, 24 Hours, 48 Hours or 72 Hours

  If 72 Hours is selected then the Authorization will be completed only after 72 hours. If it is 0 Hours the authorization is completed immediately.

- **If Transaction Status is Authorized and capture**



  The capture field is locked and the transaction will be done immediately.

- On completion of Inputting Click on Save Button to save the credit card information

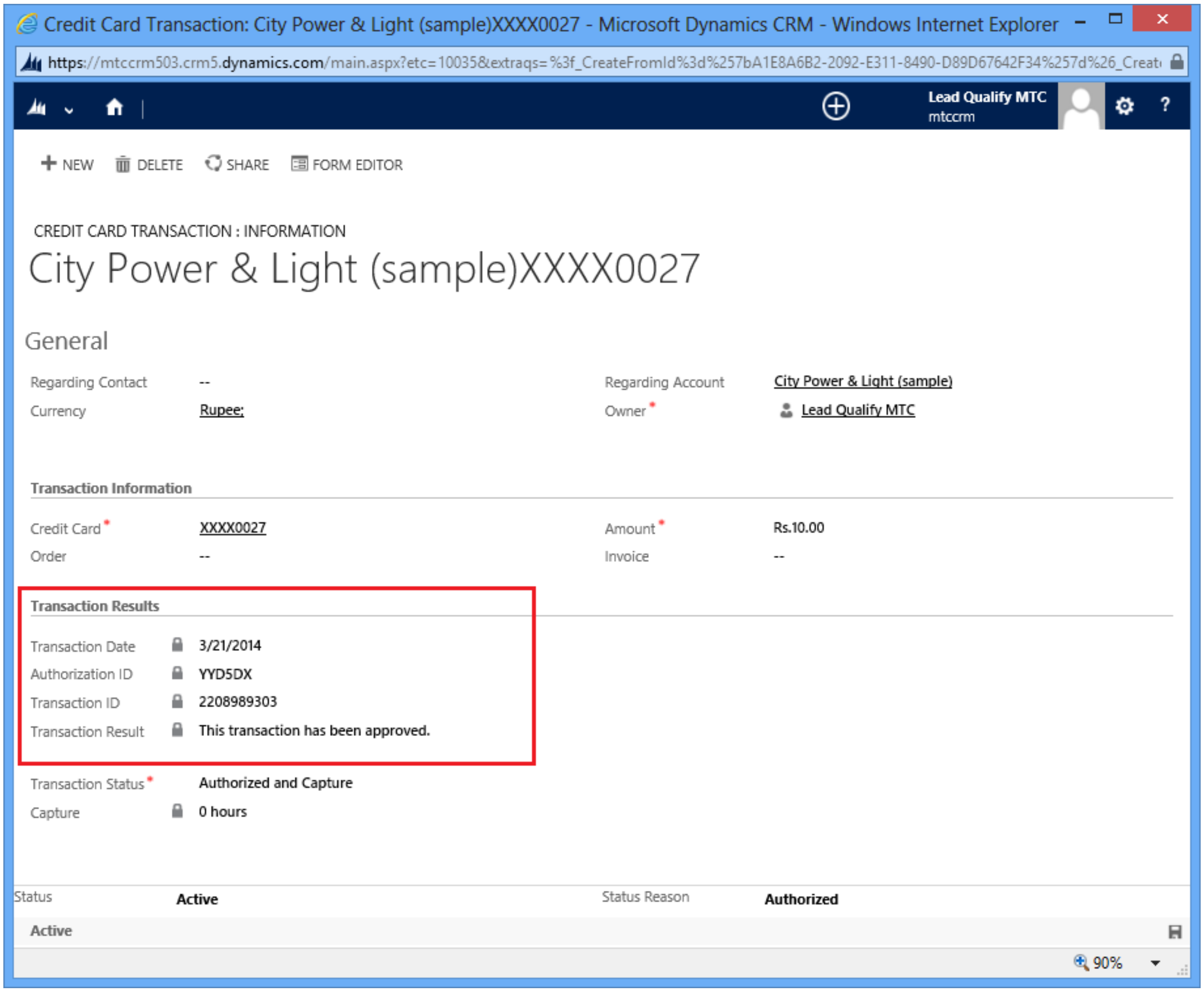


Figure 26: Showing Approved Transaction

- On saving we can view Transaction Information being updated in CRM as shown above.

Credit Card Processing from Invoice

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

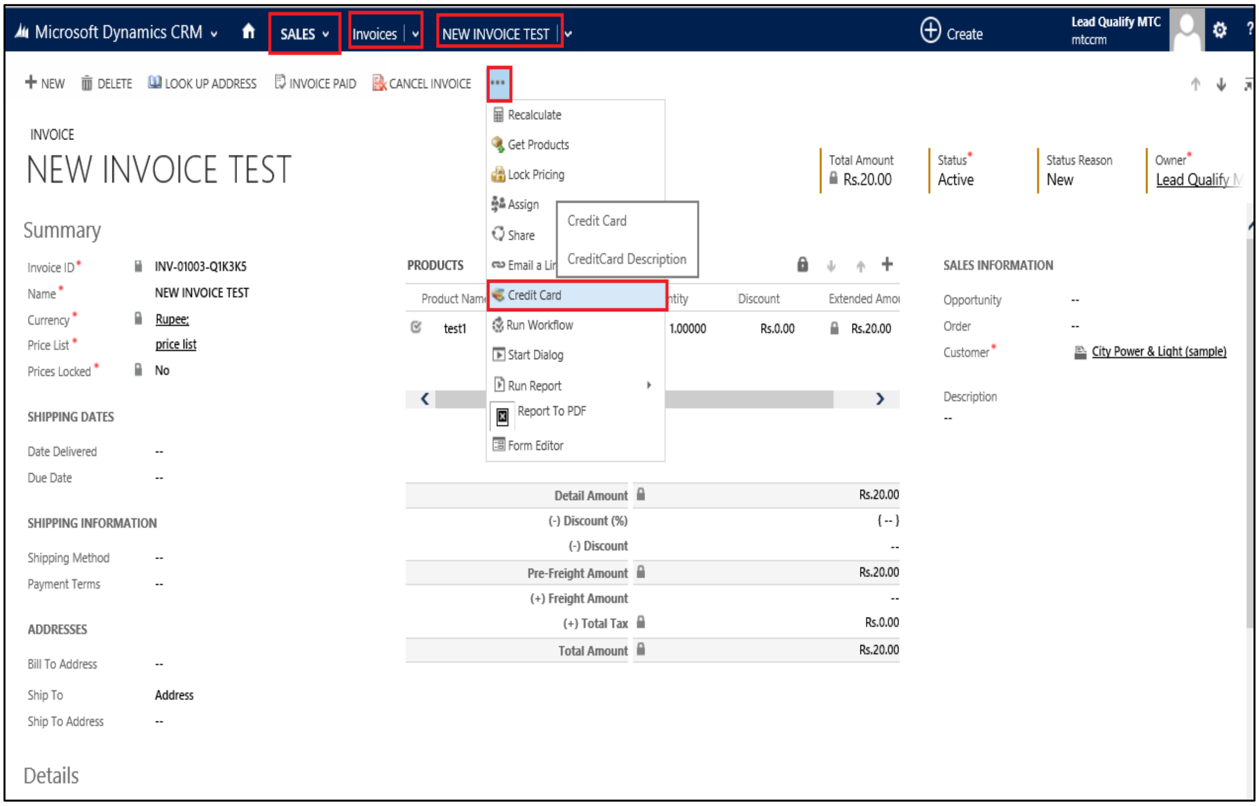


Figure 27: Invoice form showing Credit Card button

- 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 Credit Card and wait

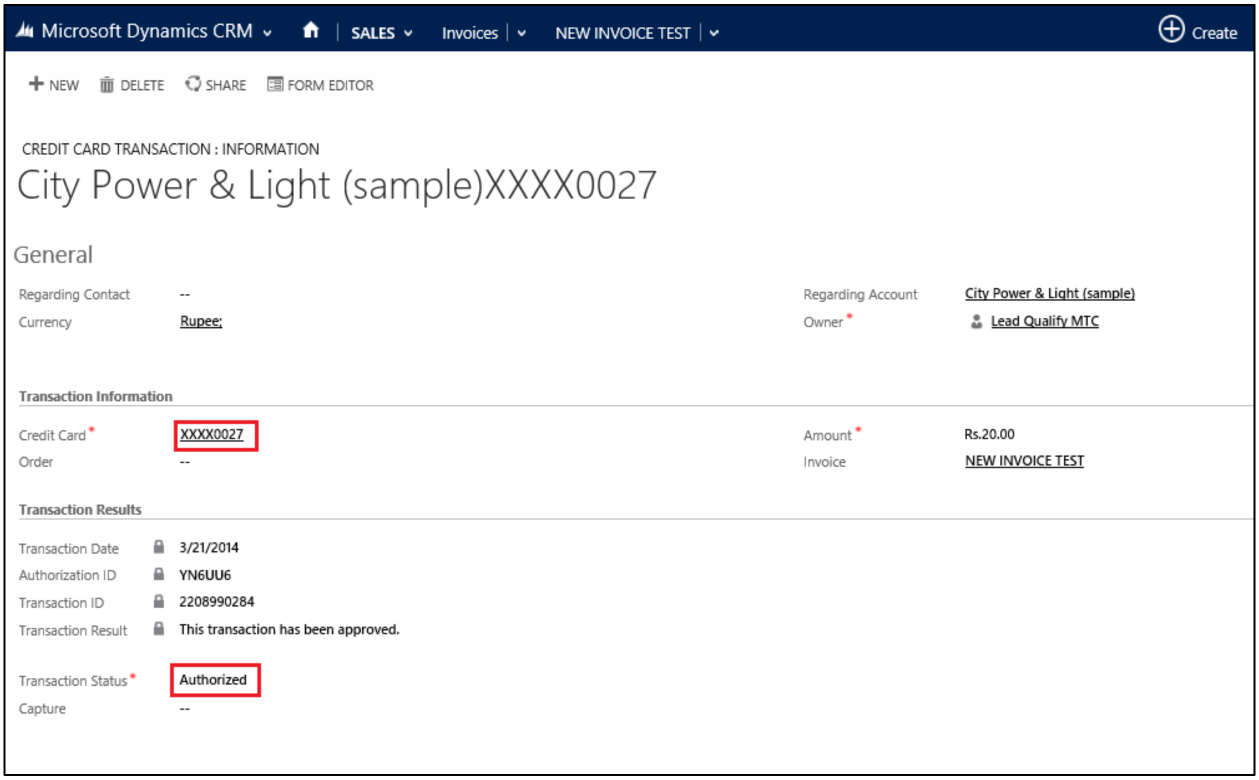


Figure 28: Invoice being processed

- Select the existing credit card from the drop down list
- Select Transaction Status (refer page no 25 for details)
- All the others like Owner, Amount, and Invoice Details are automatically captured.
- The Transaction Results are updated once the processing is done at the gateway
- Click on Save to process Payment
- Transaction Date, Authorization ID, Transaction Id and Transaction Result are displayed

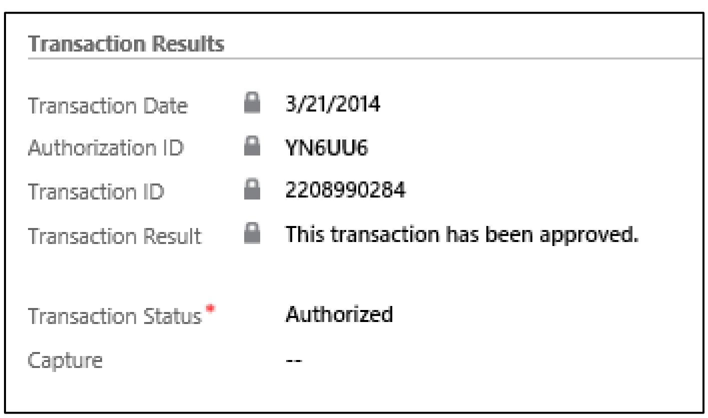


Figure 29: Credit Card operation Successful in CRM Invoice

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 **(…)** more options and select **Payments** as shown below

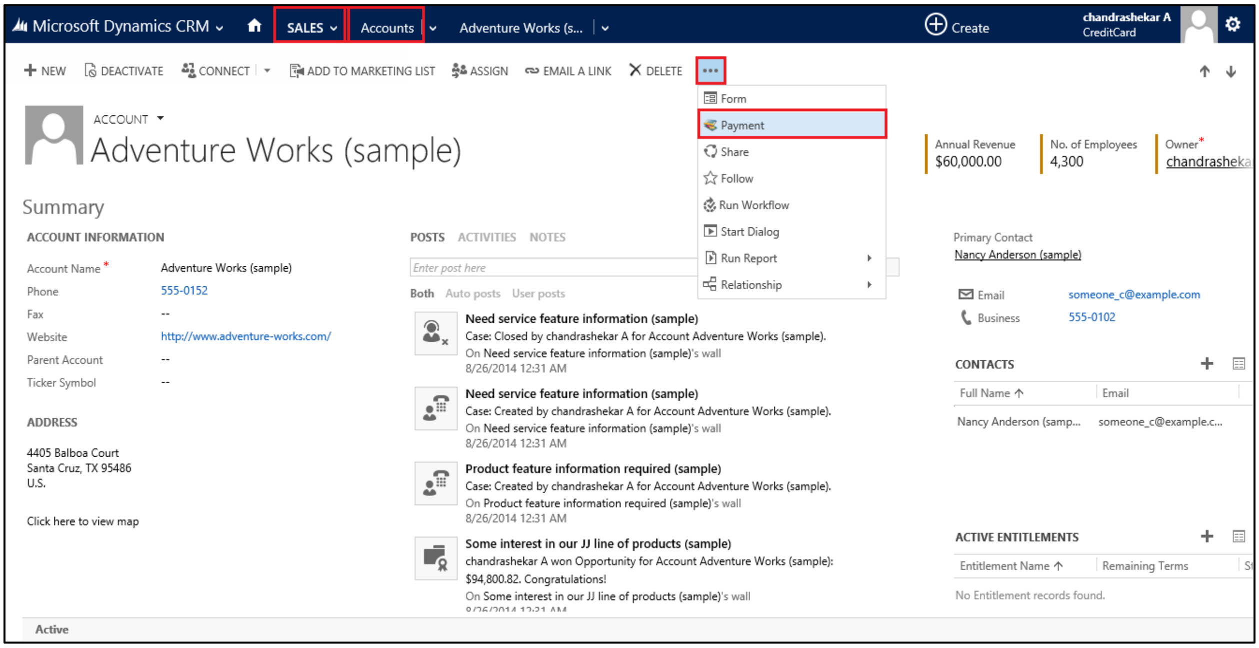


Figure 30: Account for showing payment option

- 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
  - Select the appropriate card for payment
  - 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.
  - Type in Credit Card Number against Card Number followed by
  - 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

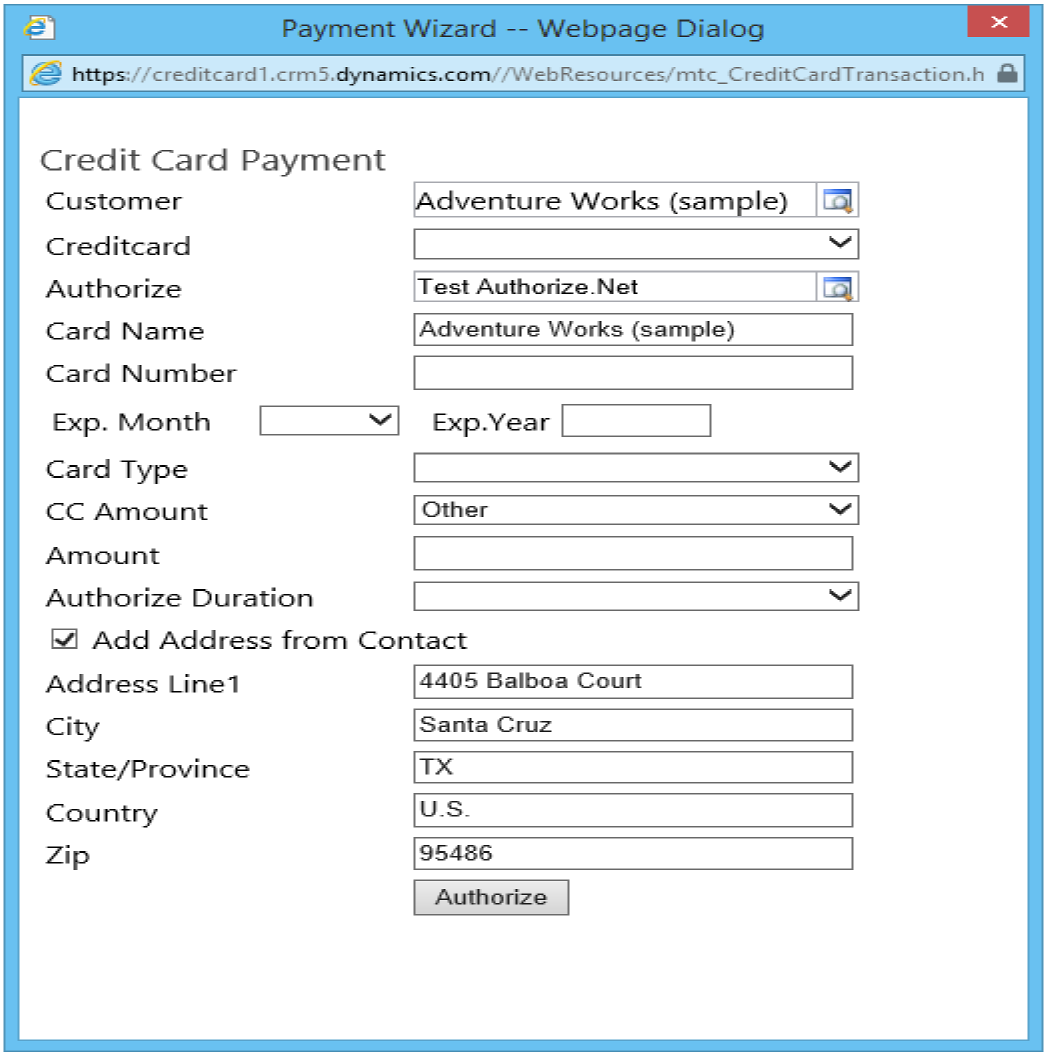


Figure 31: Payment Wizard

- Select Authorize Duration from the Drop Down list provided

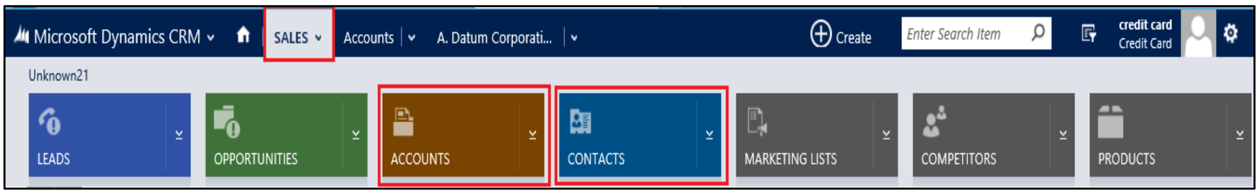
0 Hours	For Immediate processing
24 Hours	Card will be charged after 24 hours (till such time it will be in Pending)
48 Hours	Card will be charged after 48 hours (till such time it will be in Pending)
72 Hours	Card will be charged after 72 hours (till such time it will be in Pending)

- 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.

Procedure to Refund Credit Card Payment(s) to Customers

If the user wishes to refund the credit card payment back to the customer, He or She can do it easily from the CRM itself. The Refund options are shown only either in Account or Contact of the CRM. One can select Refund option from Account itself or can also select the same Refund option from the Contact also.

- Go to **CRM->Sales->> either Accounts or Contacts**
- List of all My Active Accounts or Contacts are shown in CRM



- Select and Click on Account (for example we have taken Account)

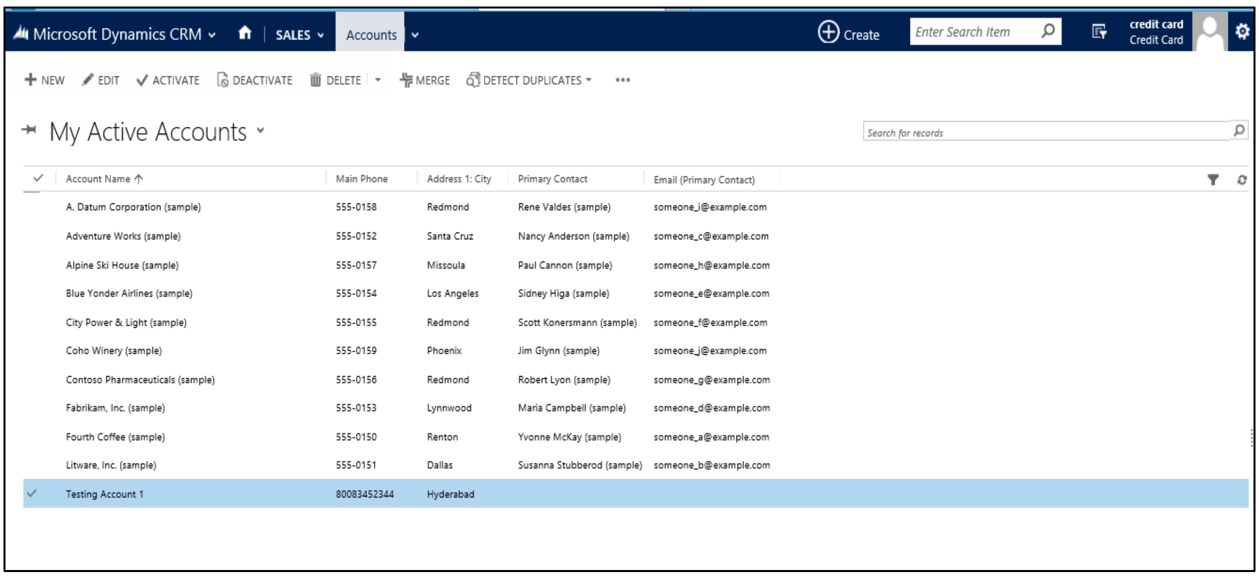
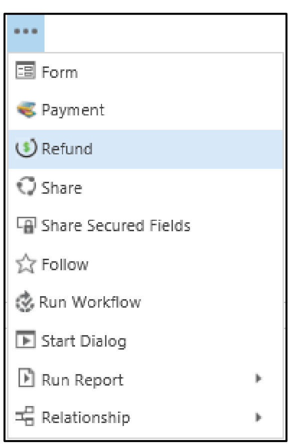


Figure 32: CRM My Active Accounts

- For example select the Account Record Testing Account 1 and click to Open



Click on (…) to get the dropdown list Showing REFUND option.

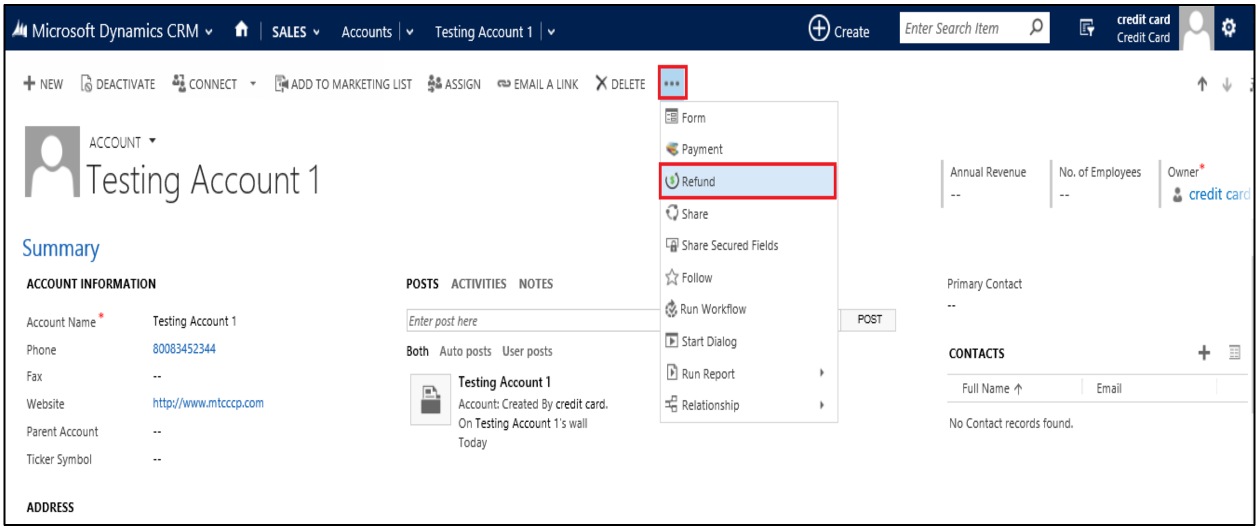


Figure 33; Account form Showing Refund option

- Now Click on Refund Option a new pop up screen
- Credit Card Number is selected by a drop down list.
- All the Credit card No's only pertaining to this Account (Testing Account 1) are displayed.
- From the list Select the card you choose to refund the payment for

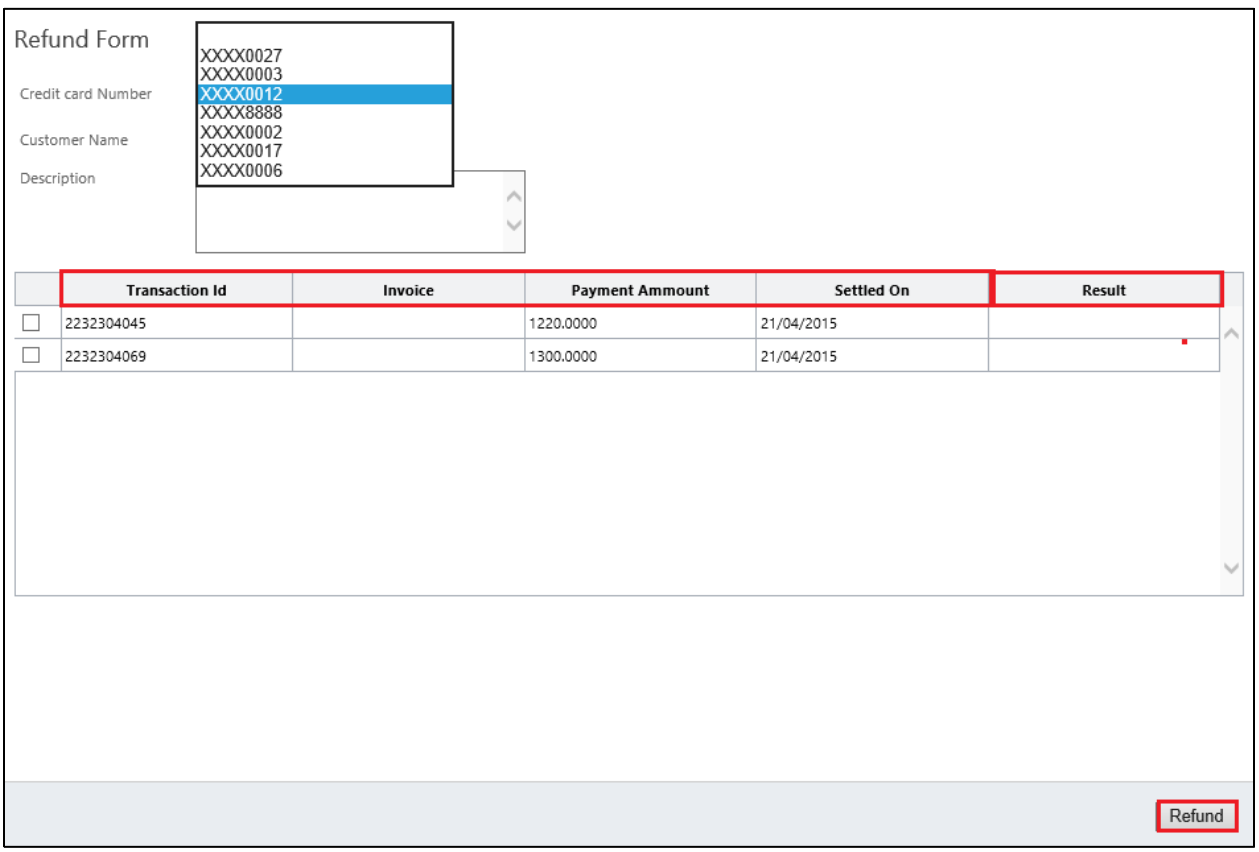


Figure 34: Refund Screen Pop up

- On Selecting the Card No, all the Settled Transactions related to the card are displayed for your ready reference
- Customer Name is Automatically filled up
- User can Enter Description in the box provided for reference.
- Details Such as Transaction ID, Invoice, Payment Amount, Settled On and Remarks
- User has to click on the check box provided against the required transaction ID
- Finally Click on REFUND button which is placed at bottom right corner

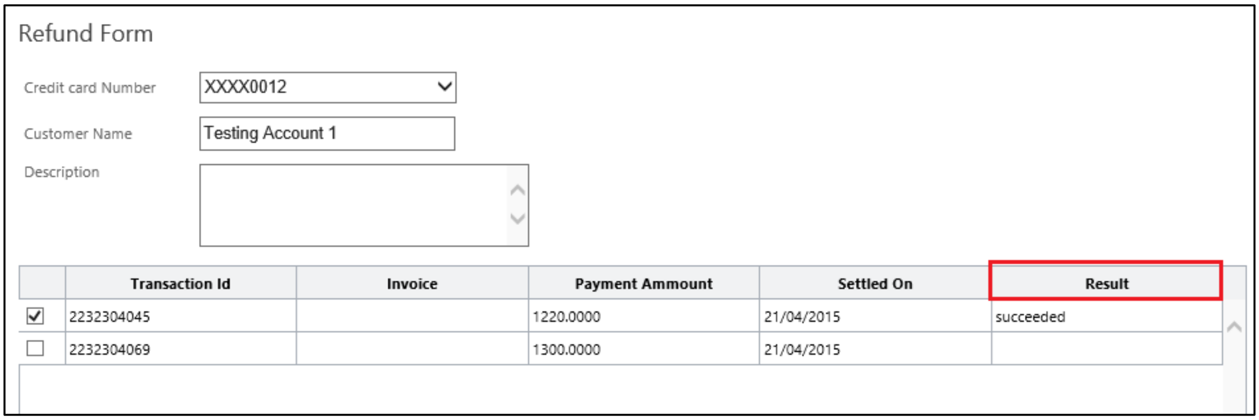


Figure 35: Showing Remarks as refund Successful.

- On Successful Refund process, In Remarks it is updated as “Succeeded” as shown above.
- User can also check for the Correctness by using Advance Find option.
- If the refund succeeded the Credit card Transaction will sent to Refunded state, Refund record goes to Inactive as shown below

Note:

- **Only users with the appropriate permissions will be able to access this feature.**
- **This feature also allows you to single full amount refund against an original transaction.**
- **Refunds are not allowed if transaction is more than 60 days old.**

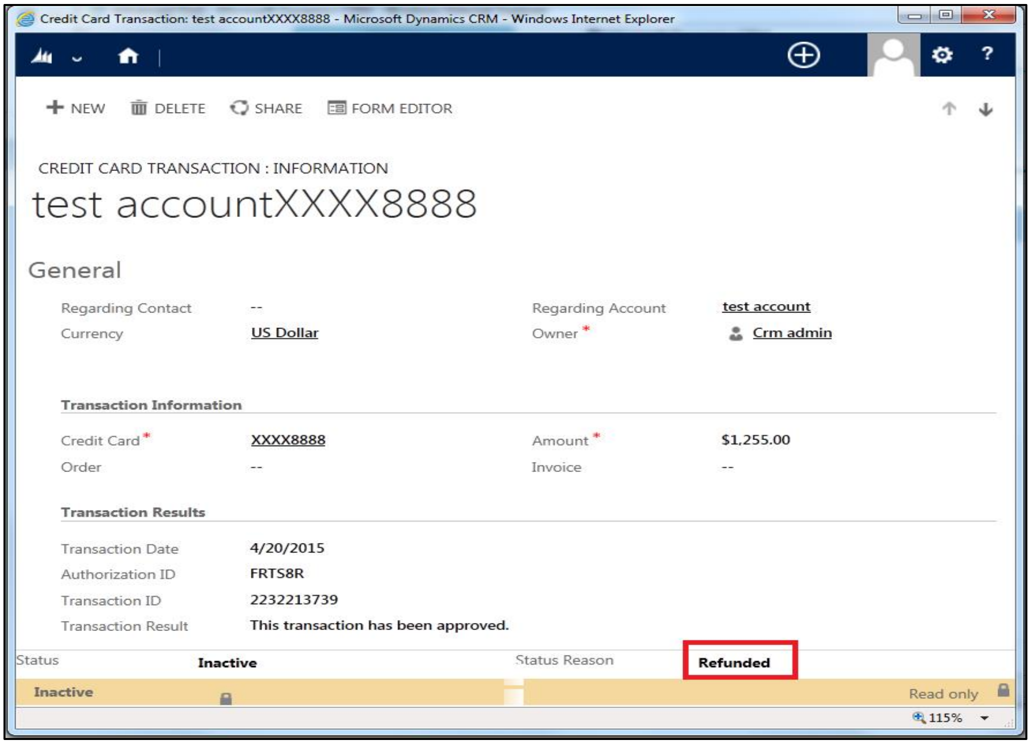


Figure 36: CC Transaction Showing Refund Status

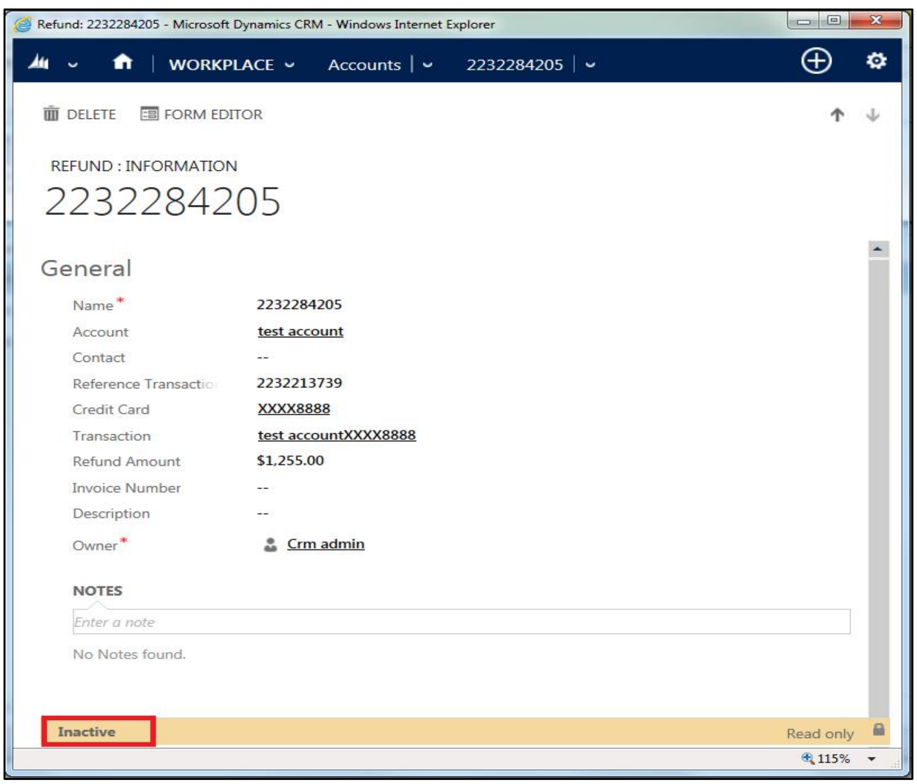


Figure 37: CC Refund showing Inactive status"

Automatic 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

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.

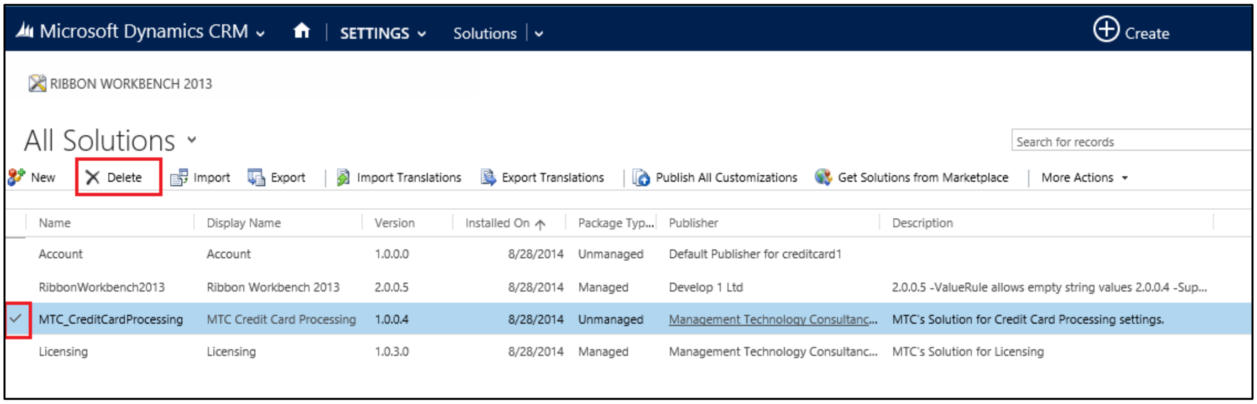


Figure 38: Deleting Credit Card processing Solution

- Click on OK to delete the solution from CRM. The solution will be deleted

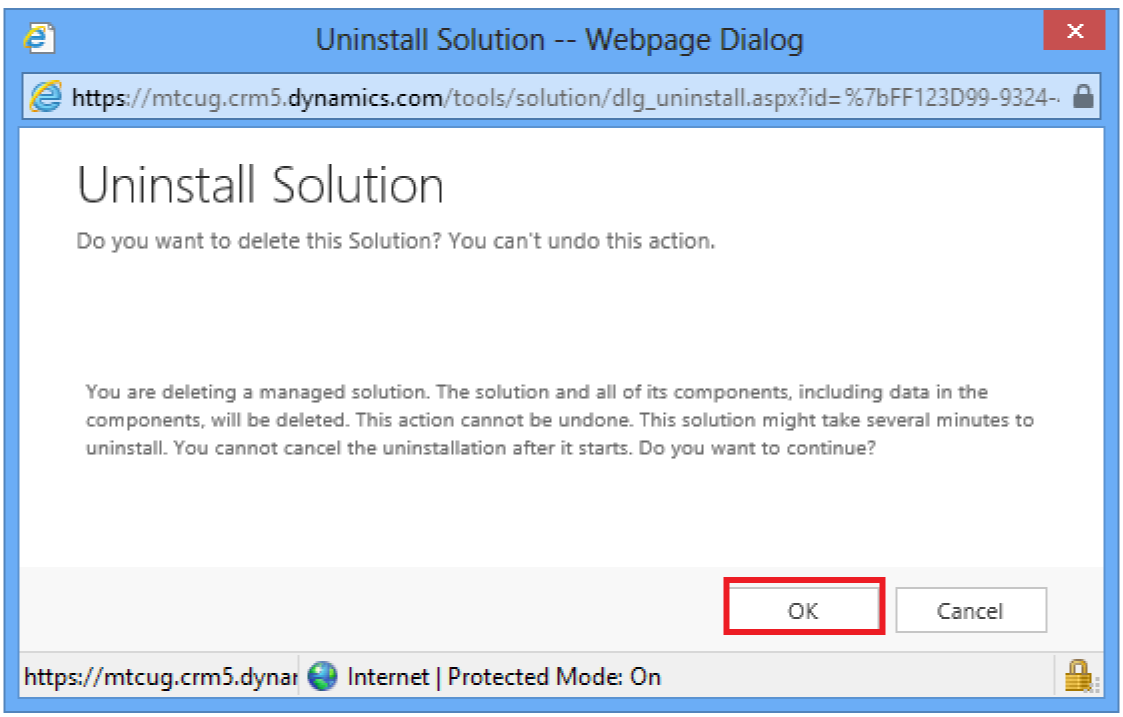


Figure 39: Uninstall Solution

- 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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8. All UPDATES provided by MTC and its affiliates shall be considered part of the Product and subject to the terms and conditions of this Agreement. Additional license terms may accompany UPDATES. By installing, copying, or otherwise using any UPDATE, End-User agrees to be bound by this Agreement and any terms accompanying each such UPDATE. If End-User does not agree to the additional license terms accompanying such UPDATES, do not install, copy, or otherwise use such UPDATES.
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13. MTC may cancel this license at any time if End-User fails to comply with the terms and conditions of this Agreement; and MTC may obtain injunctive relief and may enforce any other rights and remedies to which it may be entitled in order to protect and preserve its proprietary rights.
14. This Agreement is the complete and exclusive statement of the understanding between the parties, with respect to the subject matter, superseding all prior agreements, representations, statements and proposals, oral or written.
15. No term or provision hereof shall be deemed waived and no breach excused, unless such waiver or consent shall be in writing and signed by the party claimed to have waived or consented. Any consent by any party to, or waiver of, a breach by the other, whether express or implied, shall not constitute consent to, waiver of, or excuse for any other different or subsequent breach.

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Software products offered by Management Technology Consulting LLC, (MTC) include 1 year of Annual Maintenance and support. Annual maintenance includes your right to the latest versions and any updates to this product at no charge during the 1st year of ownership. Future years of Annual Maintenance must be purchased at a fee equal to 25% of the original purchase price of the product. MTC will notify owners of record by email of the Annual Maintenance renewal time and facilitate collection of fees and simultaneously assure the latest versions and updates are in use.

F. Customer Care details

MTC is always open to global community of Microsoft Dynamics CRM platform Software Users

Availability and hours of operation: Monday to Friday

USA PST 323-851-5008 - 8:00 AM to 6:00 PM

India IST 323-863-0077 - 8:30 PM to 8:30 AM in PST

USA Headquarters:

Management Technologies Consulting, LLC

7738 Sky hill Drive, Los Angeles, CA 90068

Request and receive support online at www.MTCCRM.com Review, order, fund, track, and manage your solution needs online securely, conveniently, affordably 24/7 with MTC online. MTC is a leader in CRM customer web Portal offerings in connected Microsoft CRM enterprise solutions for social and business transactions– see solutions in action as you get what you need from MTC online on your time.