



Microsoft Dynamics CRM / XRM Platform



User Guide



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.

Coding Version : 20152016.062016.0.8
Document Version : 20152016.062016.0.8
Date of Document : June 13, 2016

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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

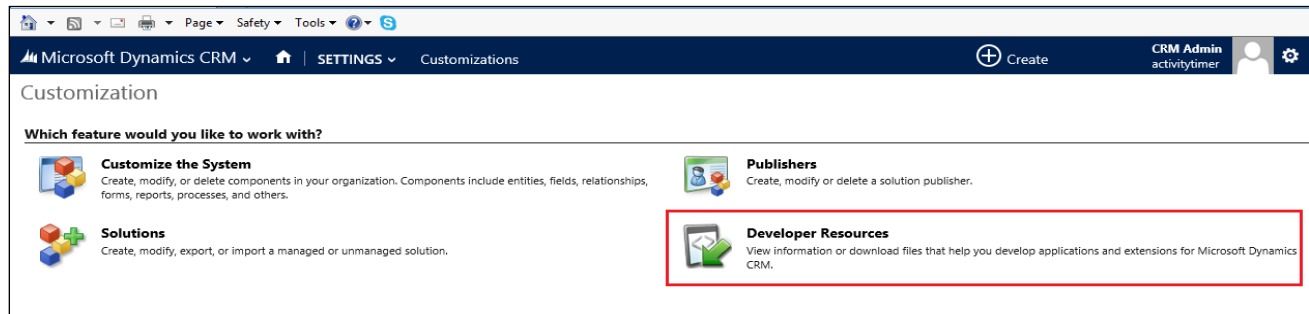


Figure 1 : Developer Resources

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

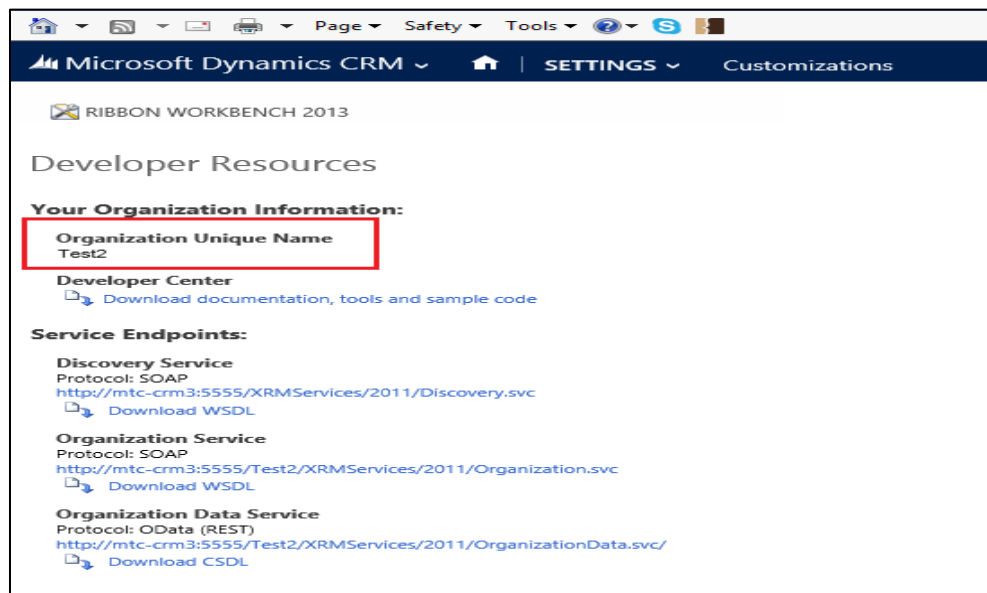


Figure 2 : Organization Unique Name

- 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.

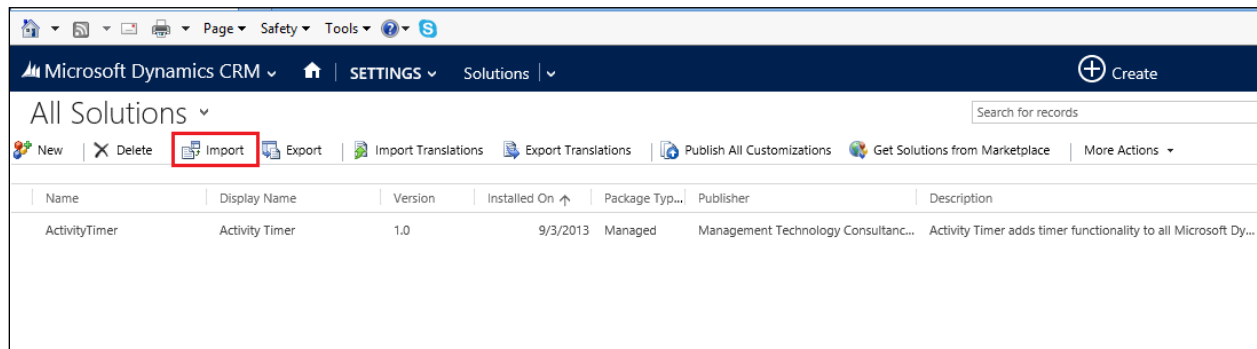


Figure 3: To Import Solution

- 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

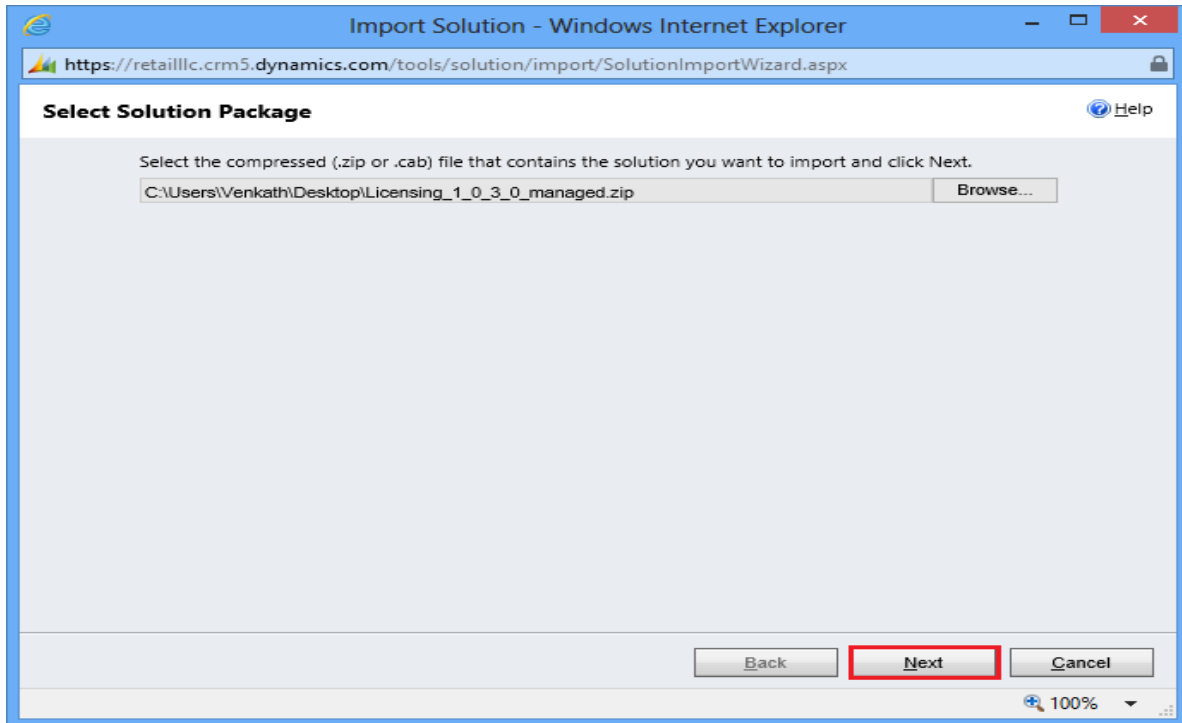
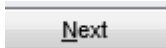


Figure 4: Select Solution Package

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

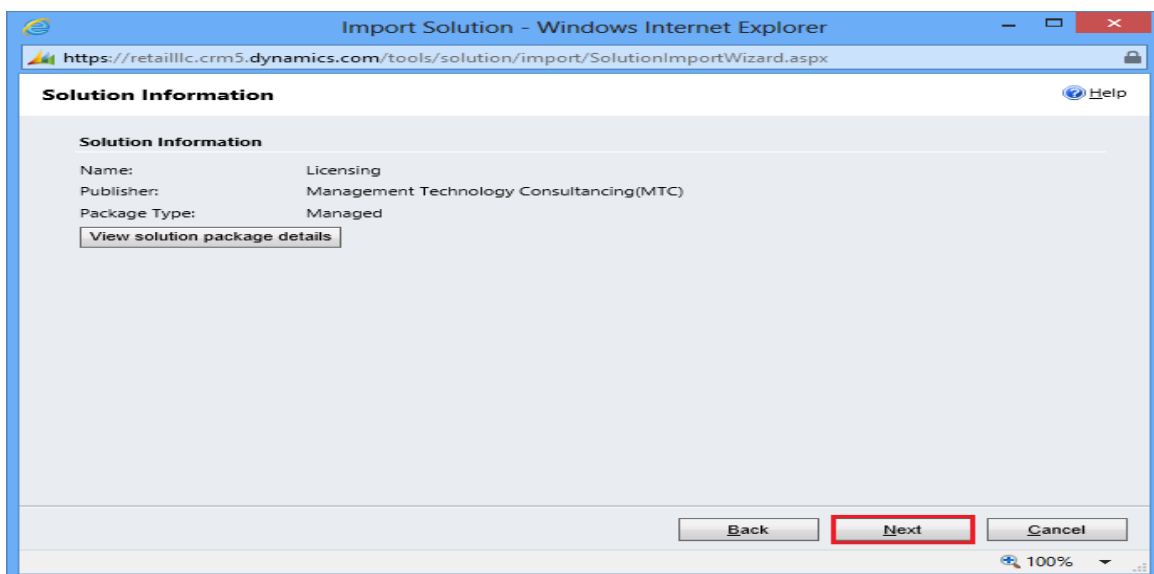
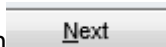


Figure 5: Solution Information

- Click on  to proceed

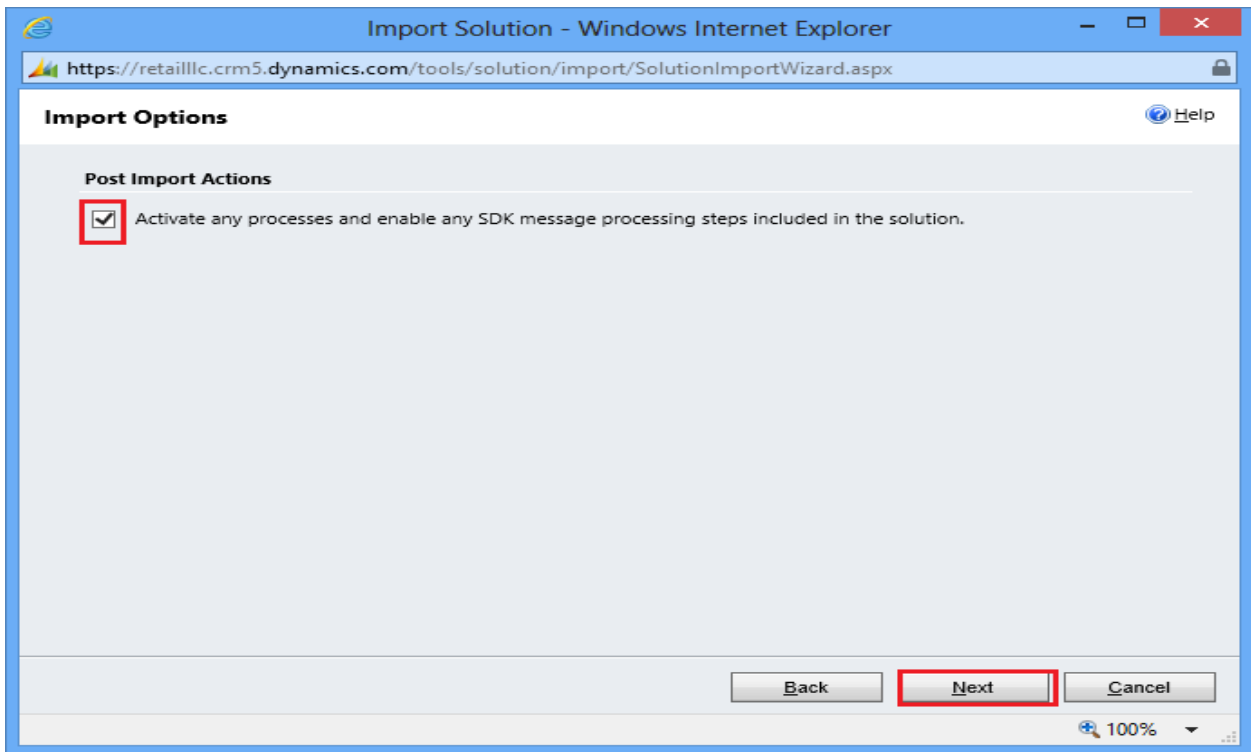
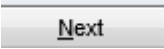
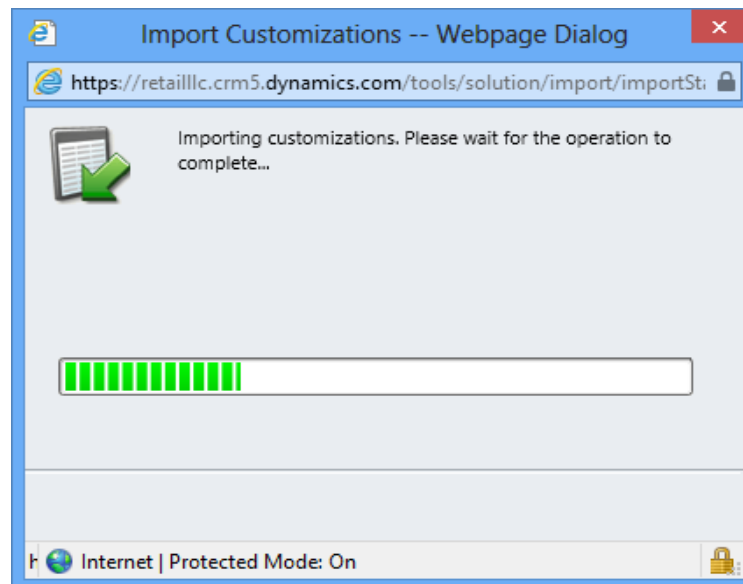


Figure 6: Import Option

- Click on  to proceed



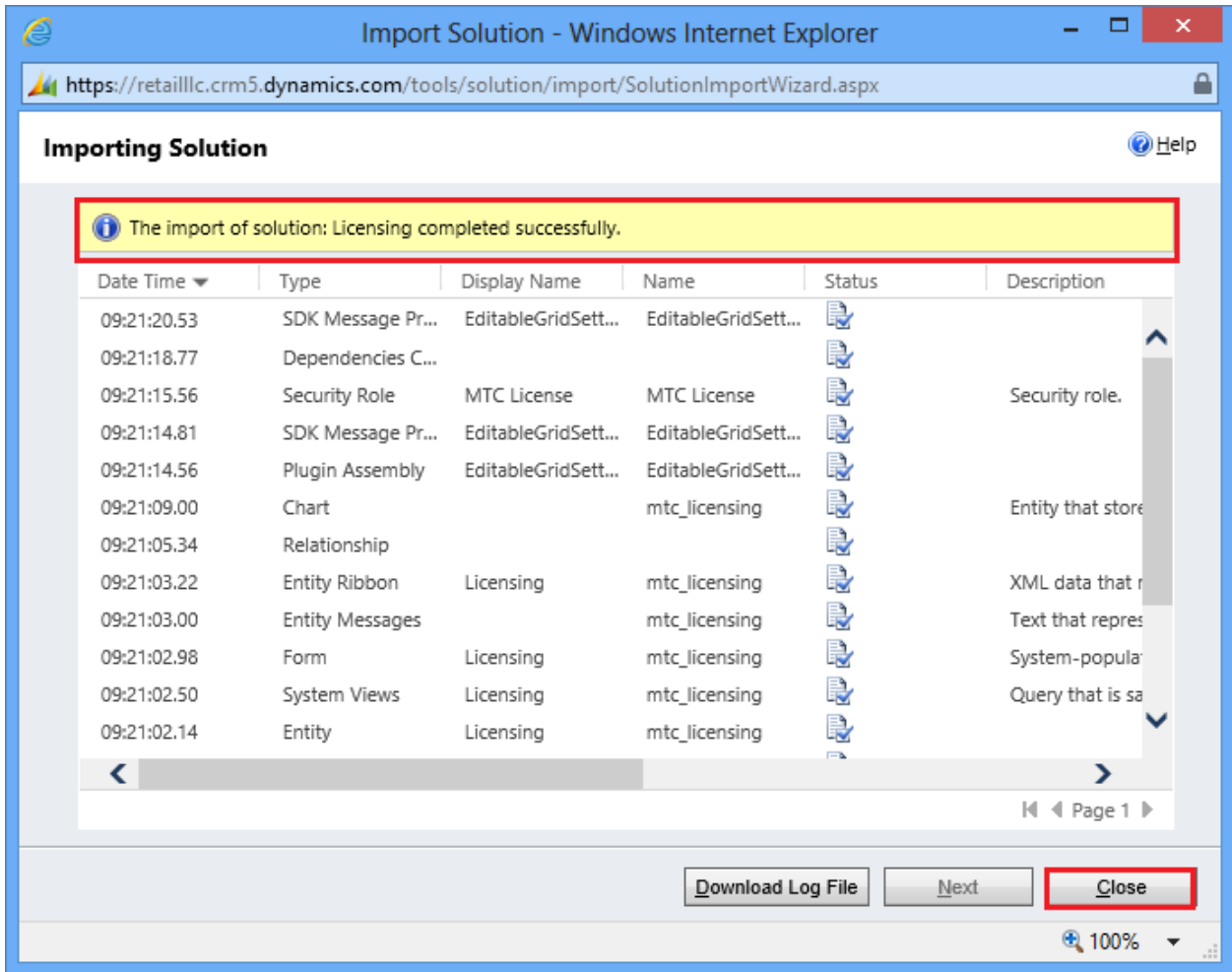
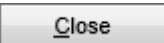


Figure 7: Importing Solution - Licensing

- Click on  after successful completion message is displayed.

Installing Credit Card Processing Solution

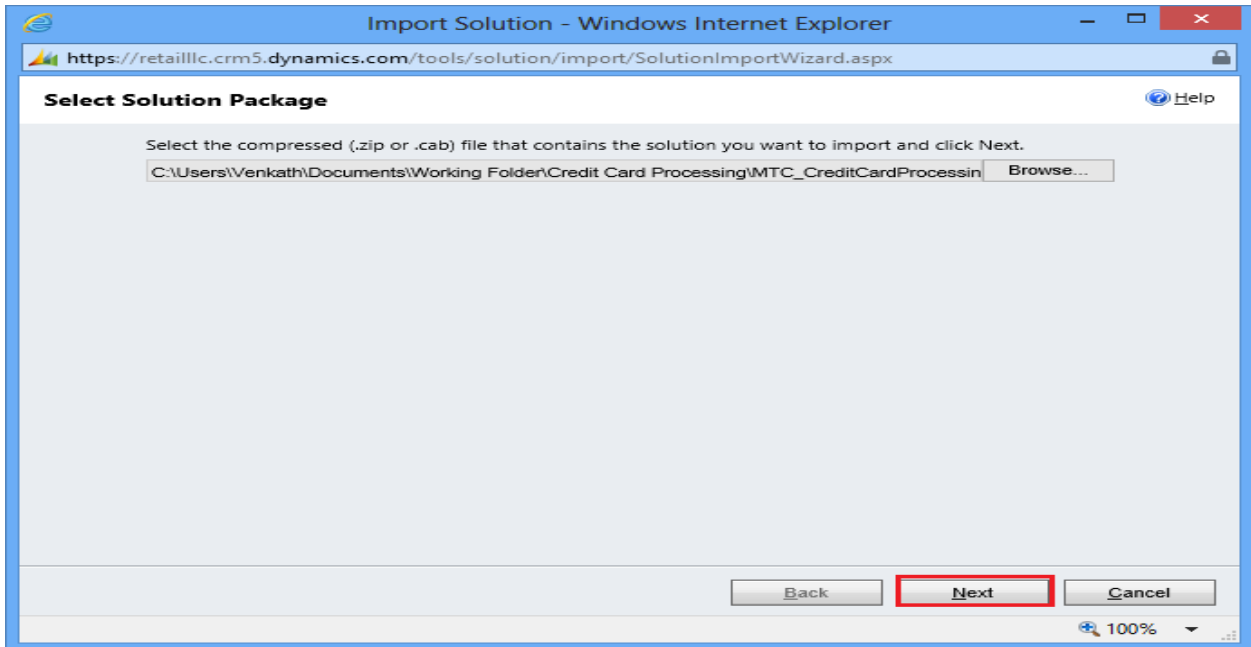
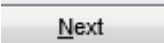


Figure 8: Select Solution Package – Credit Card

- Click on  to proceed.

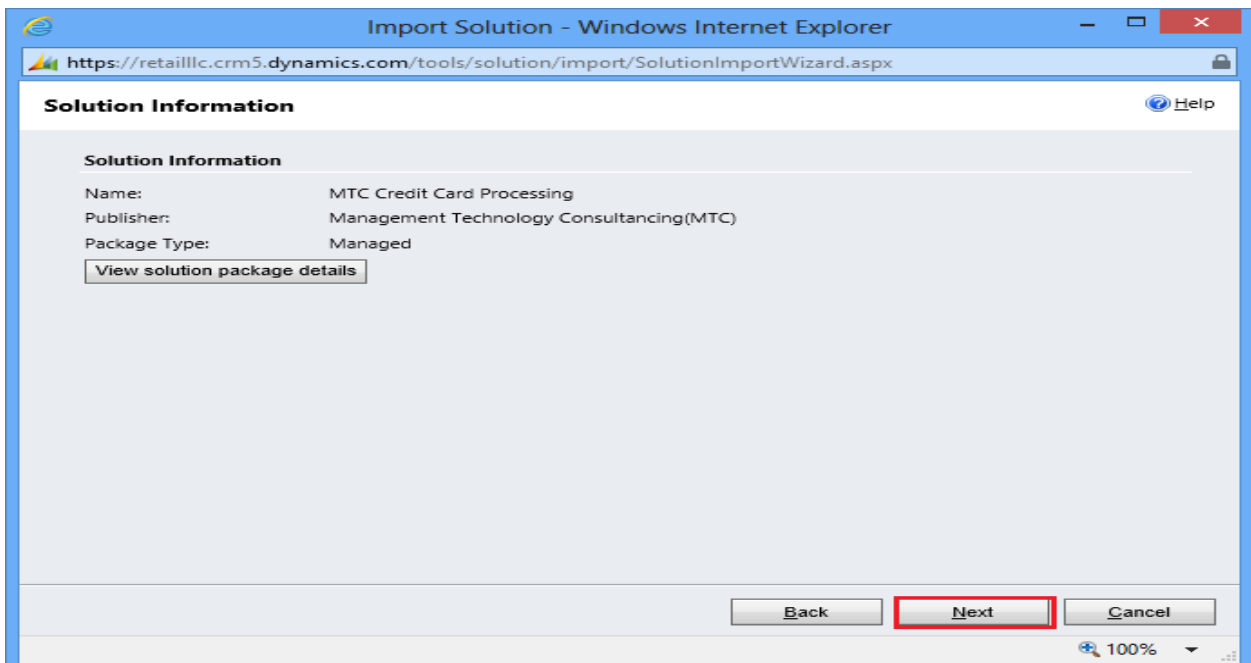
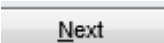


Figure 9: Solution Information

- Click on  to proceed.

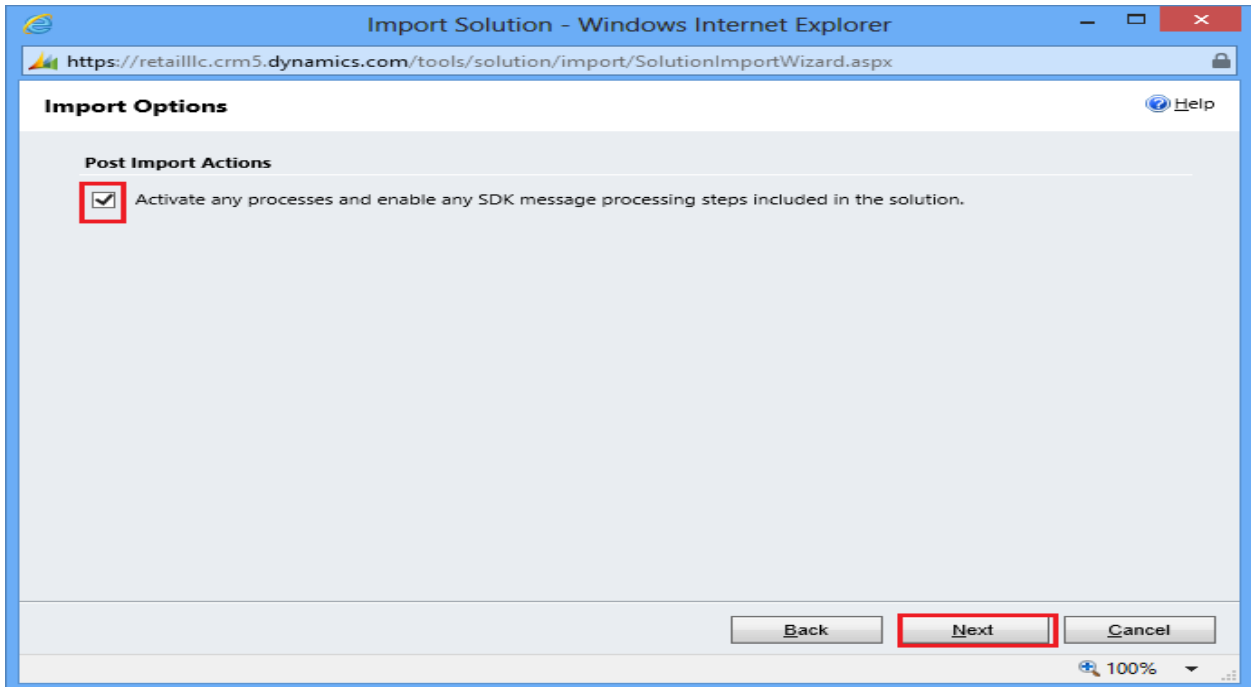
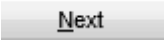
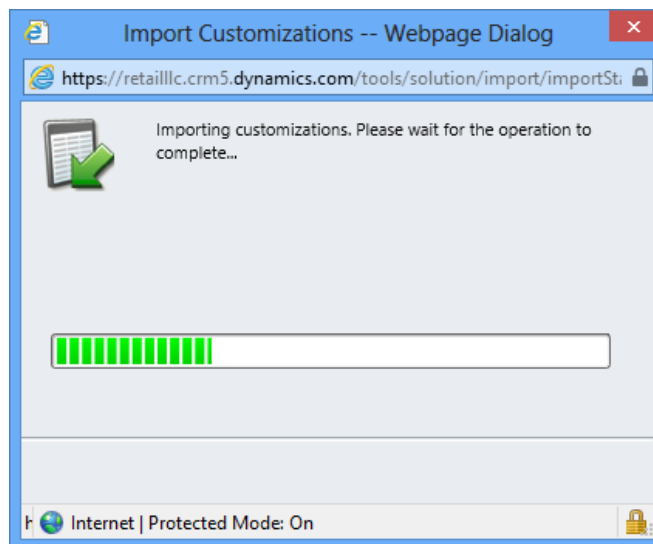


Figure 10: Import Option – credit card

- Click on  to proceed.



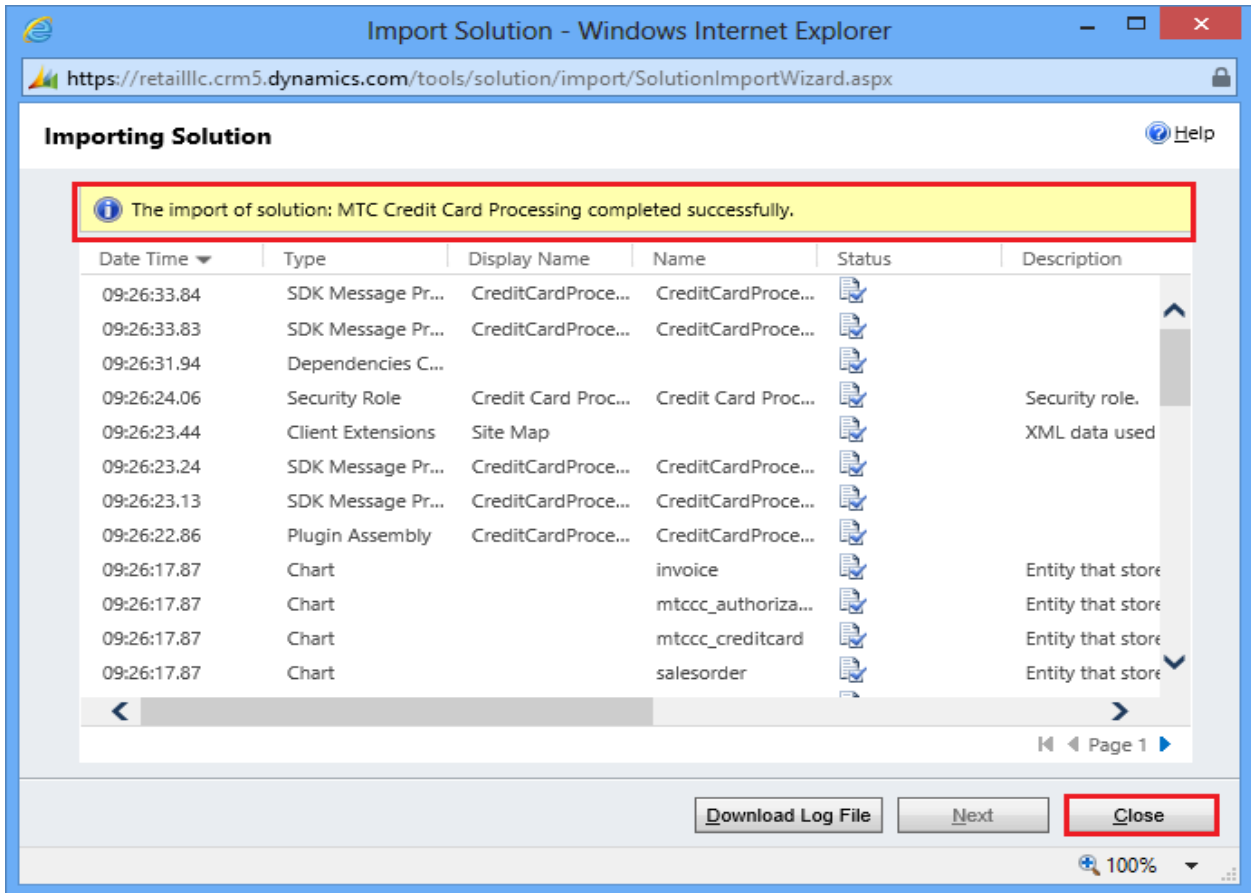
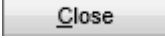
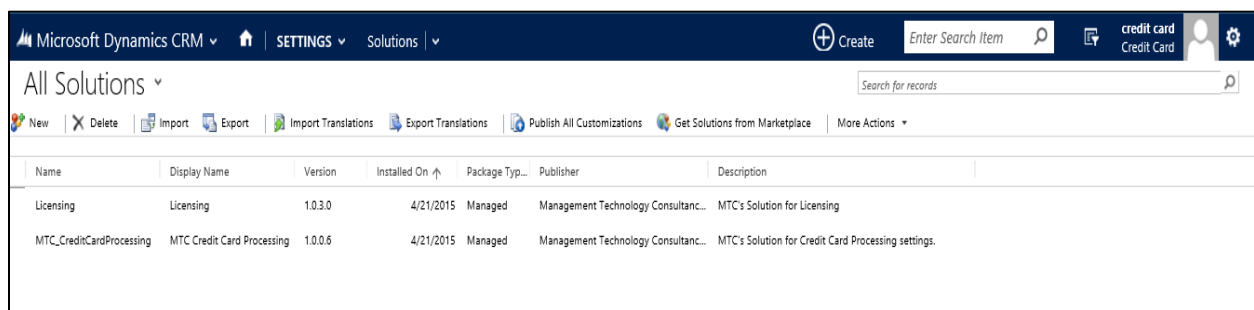


Figure 11: Importing Solution - Credit Card

- Click on  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

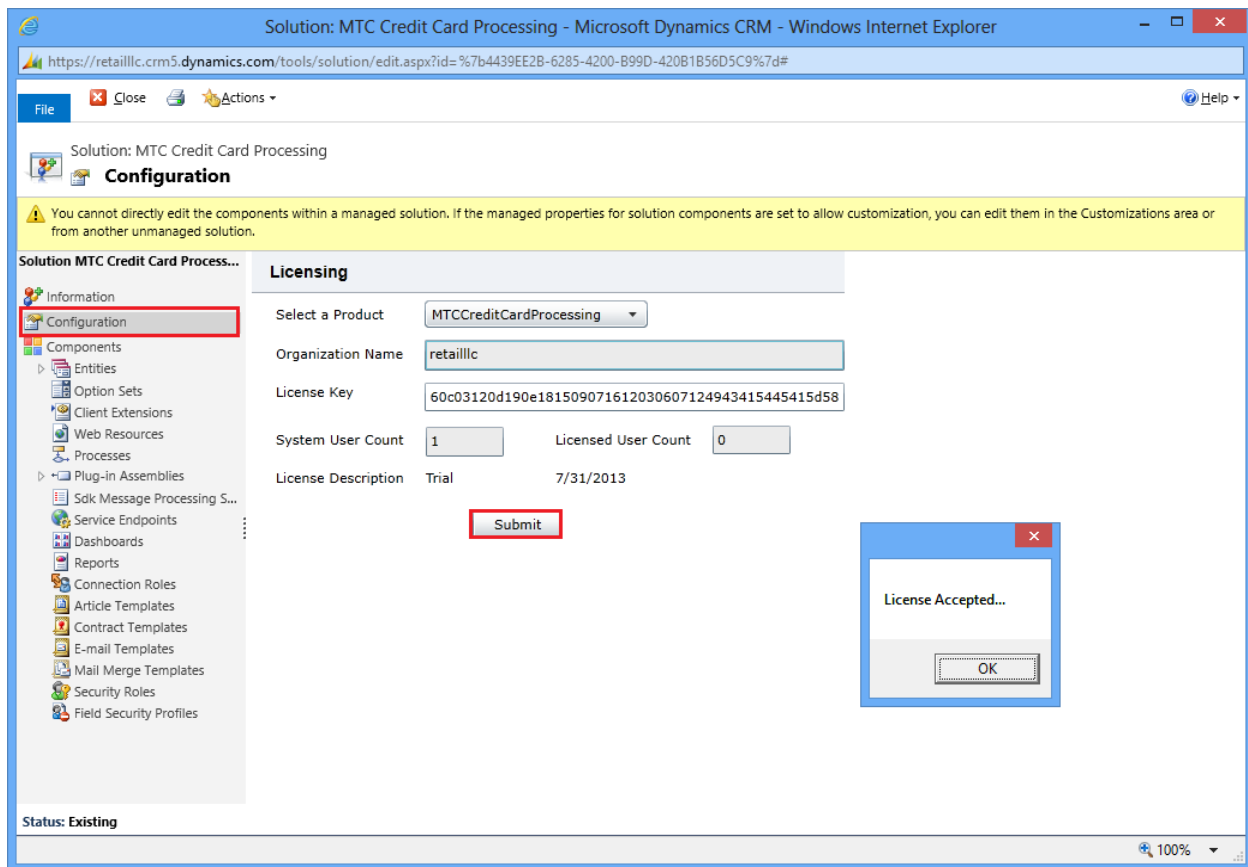



Figure 12: License Key for Credit Card

- Select Product as **MTCCreditCardProcessing**,
- Copy & Paste the License key which you have received from salesteam@mtccrm.com
- Click on 
- A pop up window appears and displays the message as **License Accepted**. Click on **OK**.

Register with Authorize.net

The user has to register 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/>

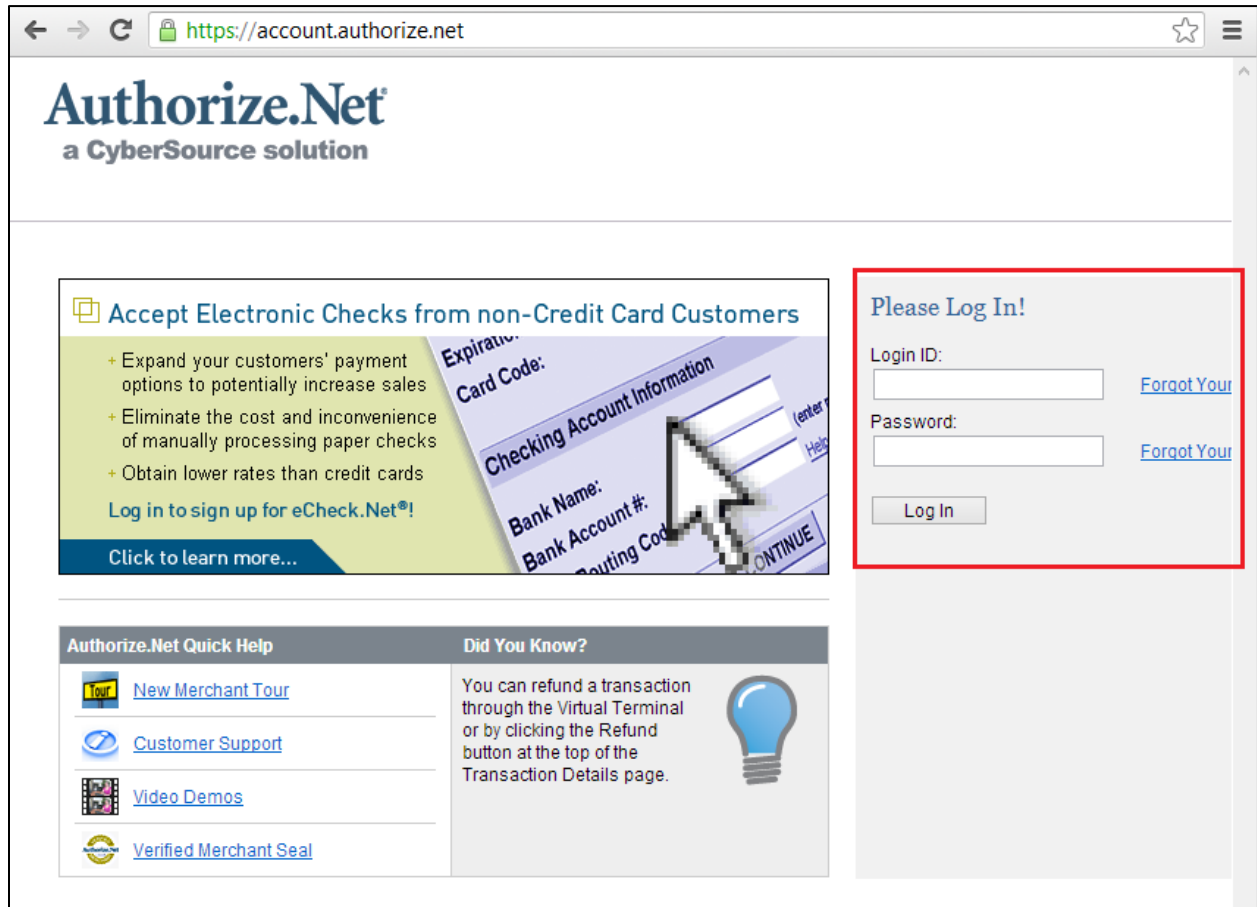



Figure 13: Authorize.net Merchant Login Screen

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



Authorize.Net
a CyberSource solution

[FEEDBACK](#)
[CONTACT US](#)
[HELP](#)
[LOG OUT](#)

Welcome: TestFirstName TestLastName

[HOME](#)
[TOOLS](#)
[REPORTS](#)
[SEARCH](#)
[ACCOUNT](#)

Virtual Terminal | Unsettled Transactions


ANNOUNCEMENTS
5/17/13
Exclusive Discount on Your Internet
Retailer Registration
5/9/13
New Partners Added to the Merchant
Toolbox
5/9/13
Authorize.Net Receives ACE Award for
Customer Support

TOOLS
Virtual Terminal
Upload Transactions
Recurring Billing
Fraud Detection Suite
Customer Information Manager
Simple Checkout

REPORTS
Transaction Detail
Transaction Statistics
Returns
Notice of Change


SEARCH
Search by Batch
Search by Business Day
Unsettled Transactions
Suspicious Transactions

ACCOUNT
Settings
Billing Information
Statements
User Administration
User Profile
Alternative Payments




Authorize.Net Support Center
The Authorize.Net Support Center, located at <https://support.authorize.net/>, provides comprehensive answers to virtually any customer support question, as well as useful links to [video demos](#), help files and information on contacting us. We strongly recommend using the Support Center anytime you need help.


PRODUCTS & SERVICES




eCheck.Net®
Offer your customers an additional payment option. eCheck Net enables you to accept and process electronic check payments directly from your website, Virtual Terminal or Batch Upload.



Automated Recurring Billing™ (ARB)
ARB enables you to create "subscriptions" for recurring billings. Simply enter the customer's payment information, billing amount, and a specific billing interval and duration. ARB automatically generates the subsequent recurring transactions for you!




Advanced Fraud Detection Suite™ (AFDS)
The Advanced Fraud Detection Suite safeguards your account using powerful transaction filters and IP address tools to identify and prevent suspicious transactions. Flexible settings allow you to customize the transaction filters to meet your unique business needs.



Customer Information Manager (CIM)
CIM allows you to store your customers' sensitive payment information on our secure servers, simplifying payments for returning customers and recurring transactions. It can also help you comply with the Payment Card Industry (PCI) Data Security Standard, since customer data is no longer stored locally.

THIRD-PARTY SOLUTION

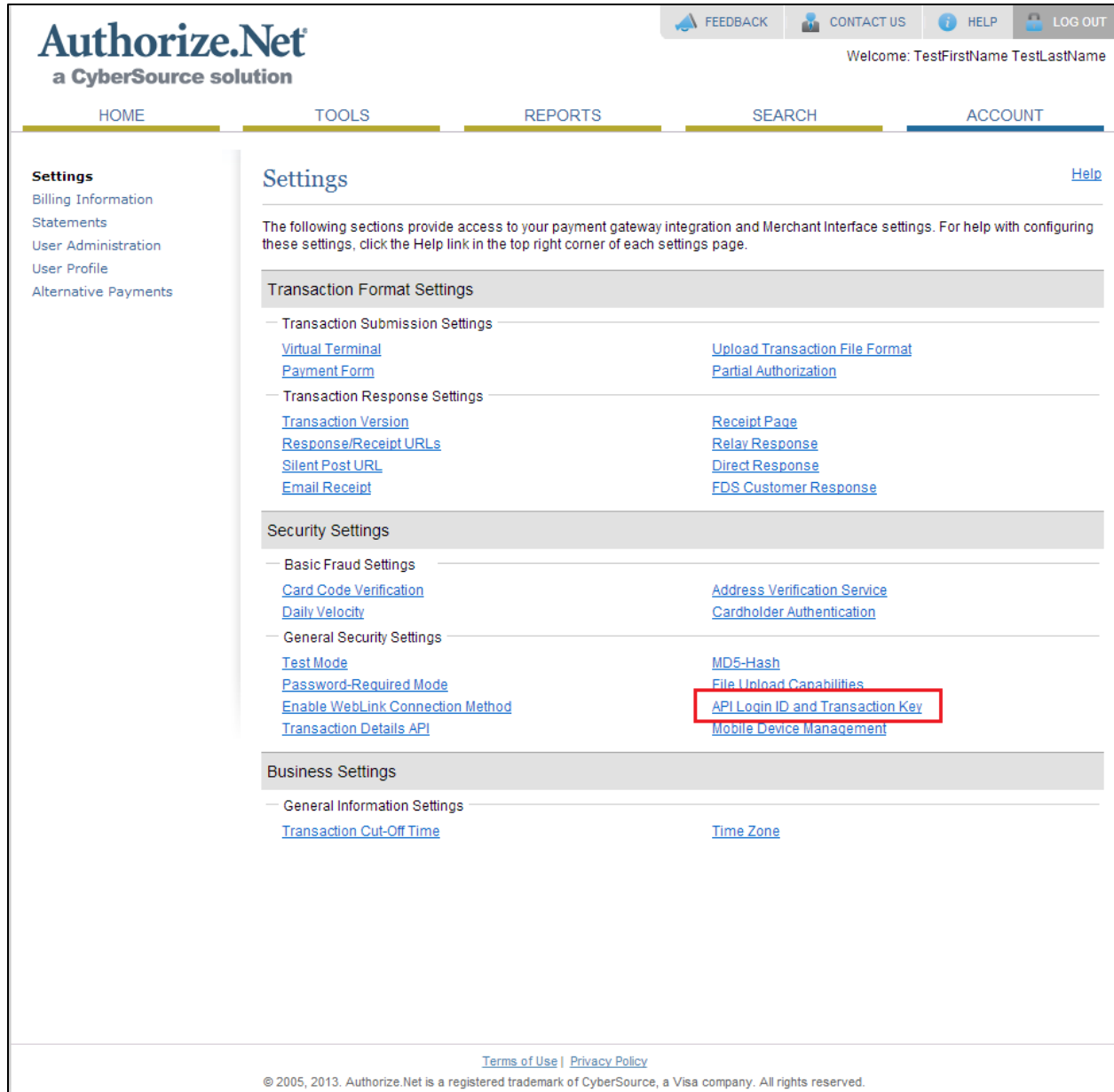


Merchant Toolbox
The Merchant Toolbox is designed to provide you with best-of-class solutions to help you better manage key areas of your business. Categories include marketing, security, accounting and business productivity. Many vendors in the Merchant Toolbox offer special discounts or other incentives exclusively to Authorize.Net merchants. Whether you're looking for help marketing your company, identifying and preventing fraudulent transactions or updating your bookkeeping, the Merchant Toolbox can help you find solutions that meet your specific business needs. We often add new partners, so be sure to check back regularly.

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Figure 14: Authorize.net - Select Account

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



Authorize.Net
a CyberSource solution

FEEDBACK CONTACT US HELP LOG OUT
Welcome: TestFirstName TestLastName

HOME TOOLS REPORTS SEARCH ACCOUNT

Settings
Billing Information
Statements
User Administration
User Profile
Alternative Payments

Settings [Help](#)

The following sections provide access to your payment gateway integration and Merchant Interface settings. For help with configuring these settings, click the Help link in the top right corner of each settings page.

Transaction Format Settings

- Transaction Submission Settings
 - [Virtual Terminal](#)
 - [Payment Form](#)
 - [Upload Transaction File Format](#)
 - [Partial Authorization](#)
- Transaction Response Settings
 - [Transaction Version](#)
 - [Response/Receipt URLs](#)
 - [Silent Post URL](#)
 - [Email Receipt](#)
 - [Receipt Page](#)
 - [Relay Response](#)
 - [Direct Response](#)
 - [FDS Customer Response](#)

Security Settings

- Basic Fraud Settings
 - [Card Code Verification](#)
 - [Daily Velocity](#)
 - [Address Verification Service](#)
 - [Cardholder Authentication](#)
- General Security Settings
 - [Test Mode](#)
 - [Password-Required Mode](#)
 - [Enable WebLink Connection Method](#)
 - [Transaction Details API](#)
 - [MD5-Hash](#)
 - [File Upload Capabilities](#)
 - [API Login ID and Transaction Key](#)
 - [Mobile Device Management](#)

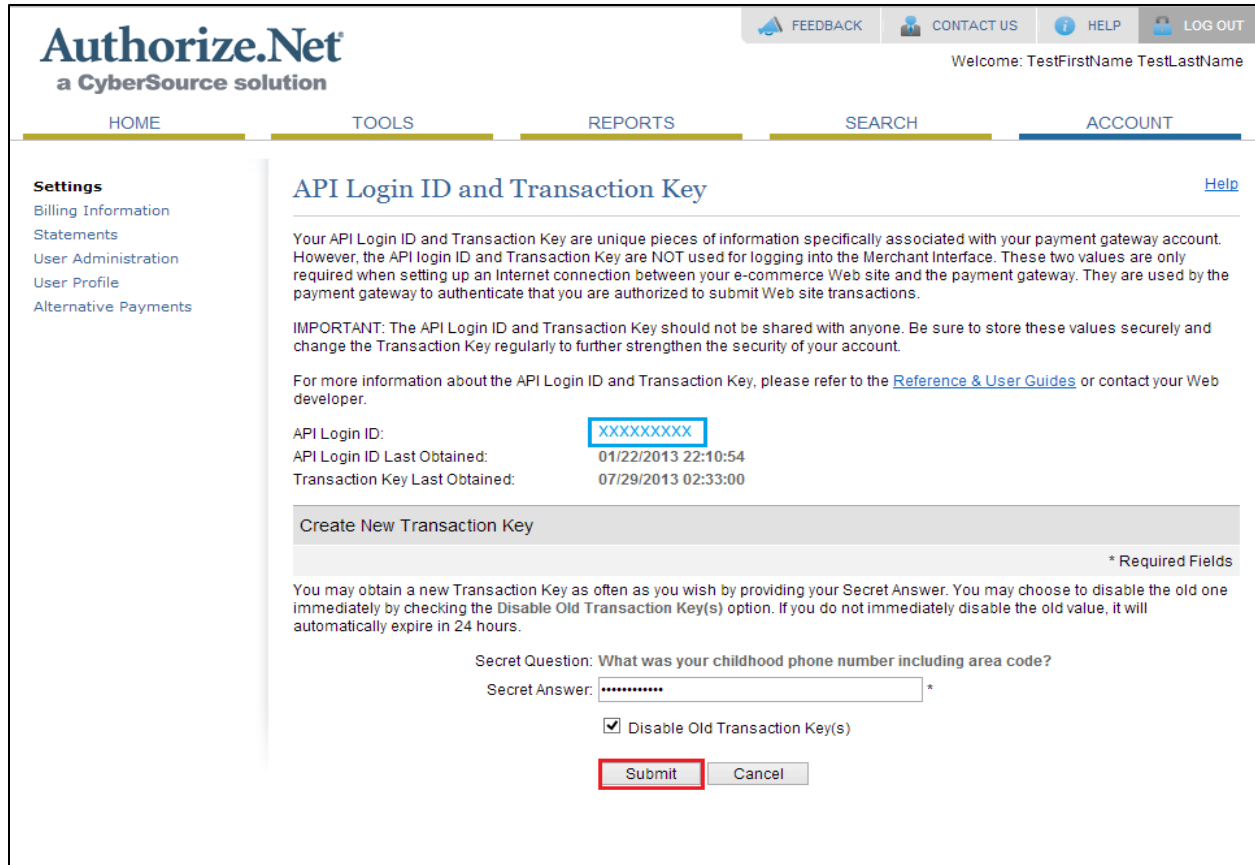
Business Settings

- General Information Settings
 - [Transaction Cut-Off Time](#)
 - [Time Zone](#)

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© 2005, 2013. Authorize.Net is a registered trademark of CyberSource, a Visa company. All rights reserved.

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.



Authorize.Net
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FEEDBACK CONTACT US HELP LOG OUT
Welcome: TestFirstName TestLastName

HOME TOOLS REPORTS SEARCH ACCOUNT

Settings
Billing Information
Statements
User Administration
User Profile
Alternative Payments

API Login ID and Transaction Key [Help](#)

Your API Login ID and Transaction Key are unique pieces of information specifically associated with your payment gateway account. However, the API login ID and Transaction Key are NOT used for logging into the Merchant Interface. These two values are only required when setting up an Internet connection between your e-commerce Web site and the payment gateway. They are used by the payment gateway to authenticate that you are authorized to submit Web site transactions.

IMPORTANT: The API Login ID and Transaction Key should not be shared with anyone. Be sure to store these values securely and change the Transaction Key regularly to further strengthen the security of your account.

For more information about the API Login ID and Transaction Key, please refer to the [Reference & User Guides](#) or contact your Web developer.

API Login ID: XXXXXXXXXX
 API Login ID Last Obtained: 01/22/2013 22:10:54
 Transaction Key Last Obtained: 07/29/2013 02:33:00

Create New Transaction Key

* Required Fields

You may obtain a new Transaction Key as often as you wish by providing your Secret Answer. You may choose to disable the old one immediately by checking the Disable Old Transaction Key(s) option. If you do not immediately disable the old value, it will automatically expire in 24 hours.

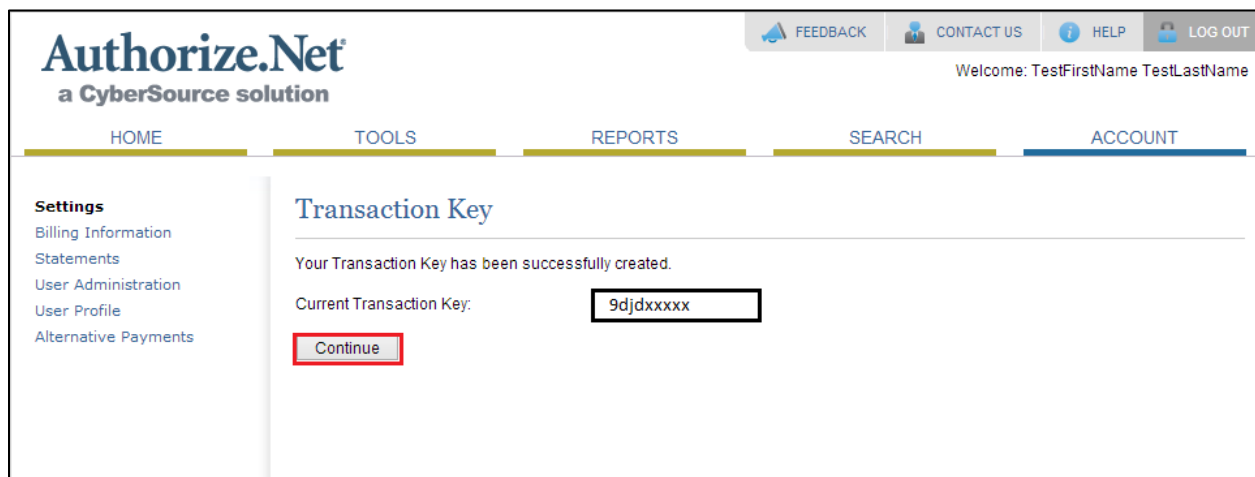
Secret Question: What was your childhood phone number including area code?
 Secret Answer:

☒ Disable Old Transaction Key(s)

Submit Cancel

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



Authorize.Net
a CyberSource solution

FEEDBACK CONTACT US HELP LOG OUT
Welcome: TestFirstName TestLastName

HOME TOOLS REPORTS SEARCH ACCOUNT

Settings
Billing Information
Statements
User Administration
User Profile
Alternative Payments

Transaction Key

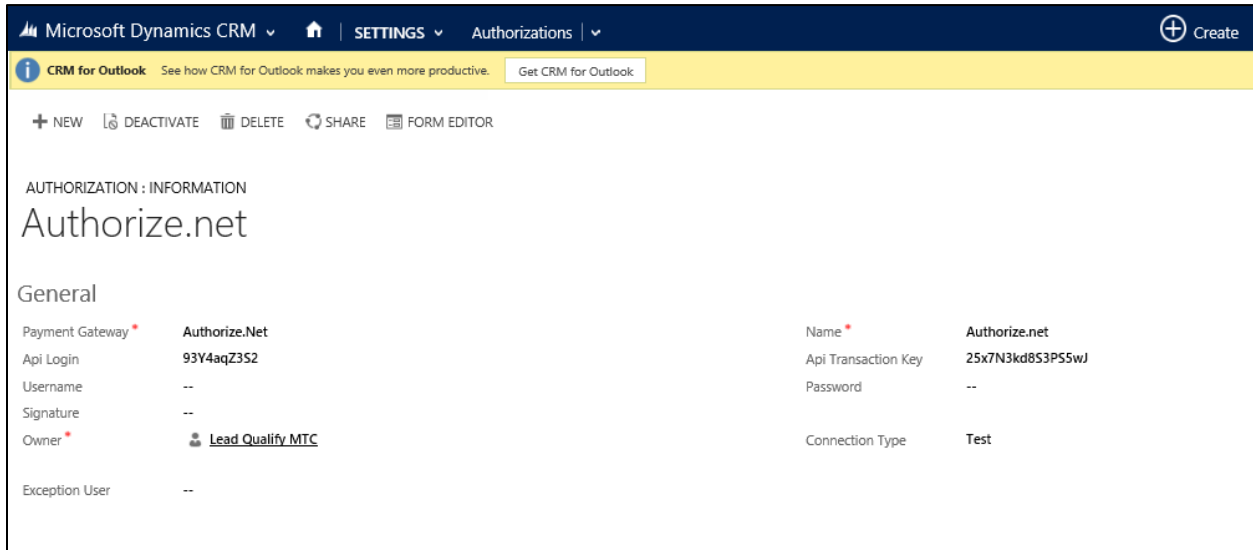
Your Transaction Key has been successfully created.

Current Transaction Key: 9djdxxxx

Continue

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



Microsoft Dynamics CRM | SETTINGS | Authorizations | Create


CRM for Outlook See how CRM for Outlook makes you even more productive. Get CRM for Outlook

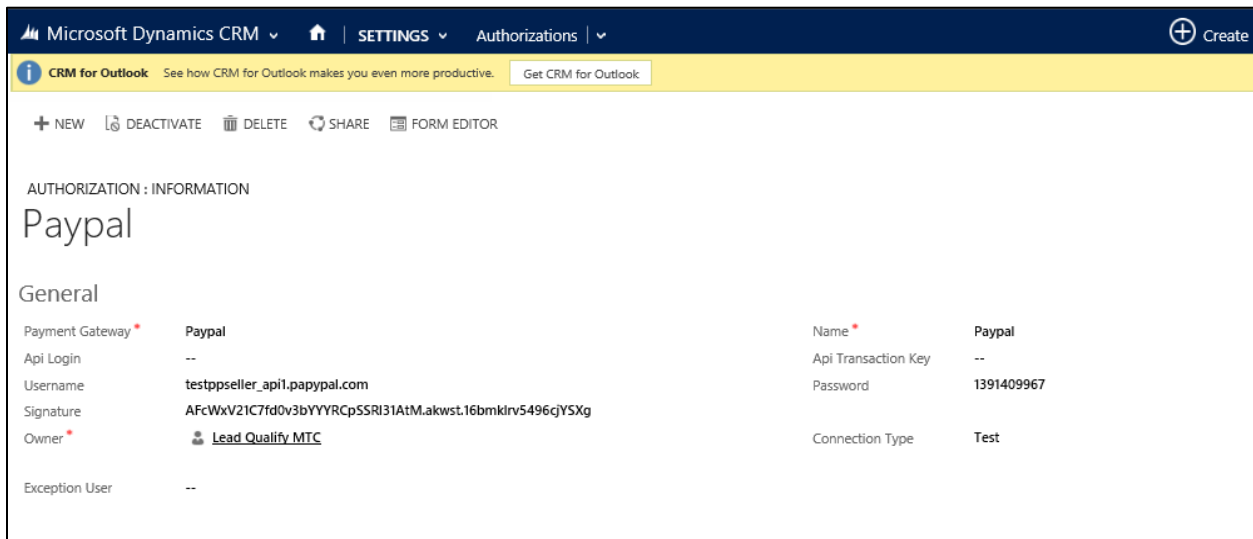
+ NEW DEACTIVATE DELETE SHARE FORM EDITOR

AUTHORIZATION : INFORMATION

Authorize.net

General

Payment Gateway *	Authorize.Net	Name *	Authorize.net
Api Login	93Y4aqZ3S2	Api Transaction Key	25x7N3kd8S3P5SwJ
Username	--	Password	--
Signature	--	Connection Type	Test
Owner *	 Lead Qualify MTC		
Exception User	--		



Microsoft Dynamics CRM | SETTINGS | Authorizations | Create

CRM for Outlook See how CRM for Outlook makes you even more productive. Get CRM for Outlook

+ NEW DEACTIVATE DELETE SHARE FORM EDITOR

AUTHORIZATION : INFORMATION

Paypal

General


Payment Gateway *	Paypal	Name *	Paypal
Api Login	--	Api Transaction Key	--
Username	testppseller_api1.papypal.com	Password	1391409967
Signature	AFcWxV2IC7fd0v3bYYRCpSSRI31AtM.akwst.16bmkirv5496qY5Xg	Connection Type	Test
Owner *	 Lead Qualify MTC		
Exception User	--		

Figure 18: CRM form to create Authorization

- On Creating the records you will view the

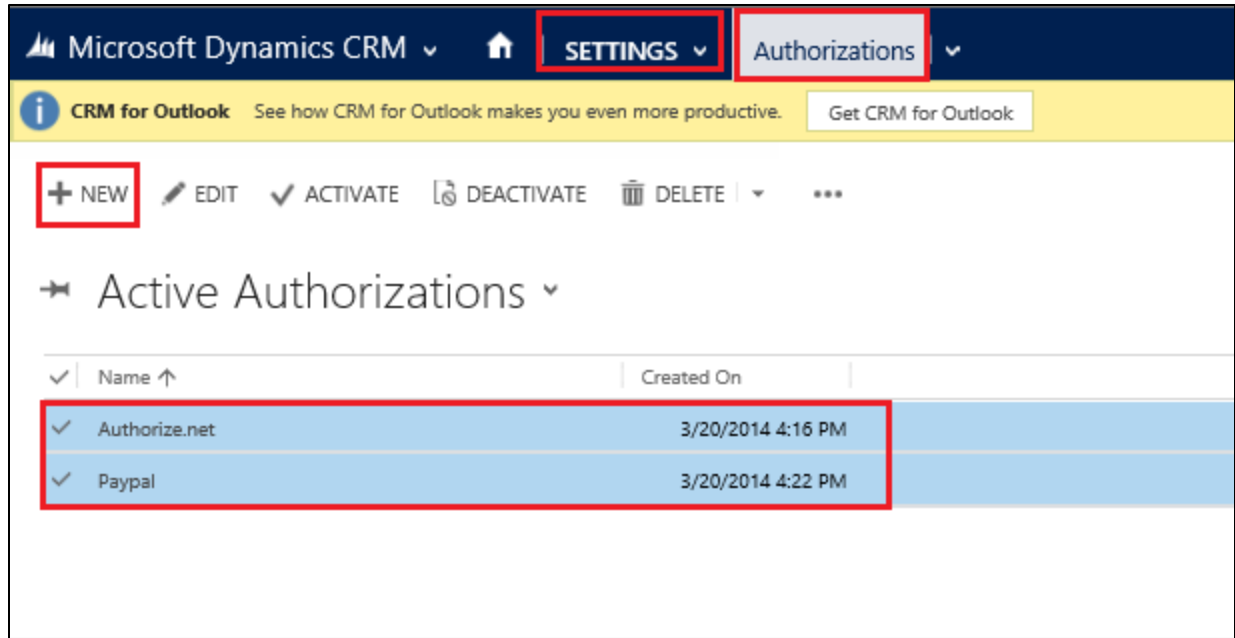


Figure 19: CRM screen - Storing API Login details

- 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)

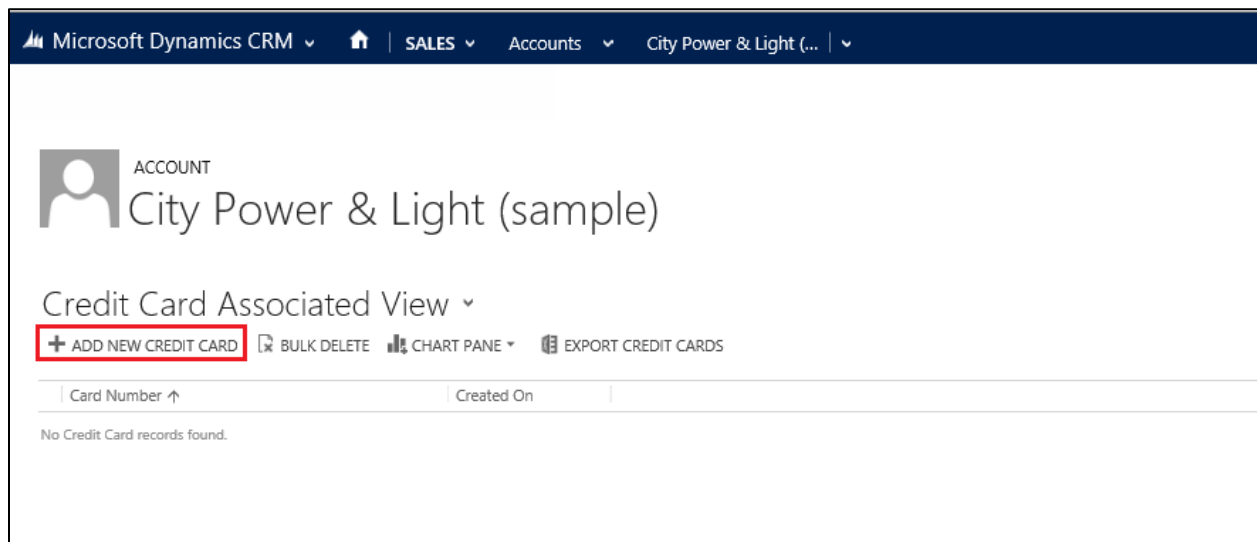
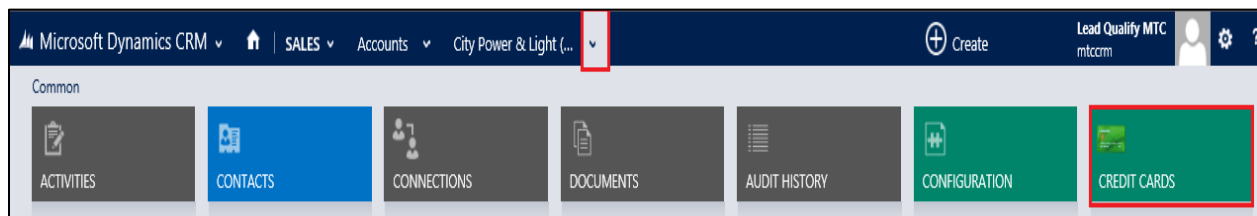


Figure 20: CRM Account form

SAVE **SAVE & CLOSE** **+ NEW** **FORM EDITOR**

Lead Quality MTC mtccrm

CREDIT CARD : INFORMATION

New Credit Card

General

Contact -- Account City Power & Light (sample)

Credit Card Information

Payment Gateway Ty **Authorize.Net** Authorization * **Authorize.net**
 Exp Month * **2** Exp Year * **3/20/2014 4:16 PM**
 Card Number * **4007000000027** Card Code * **3/20/2014 4:22 PM**
 Card Type **Visa**
 Encrypted Token --
 Credit Card Status --

Billing Address

FirstName * -- Last Name * --
 Street1 -- City --
 Street2 -- State / Province --
 Street 3 -- Country --
 Phone -- Zip --
 Email * --

Administration

Created By -- Modified By --
 Created On -- Modified On --
 Owner * **Lead Quality MTC**

Status **Active**

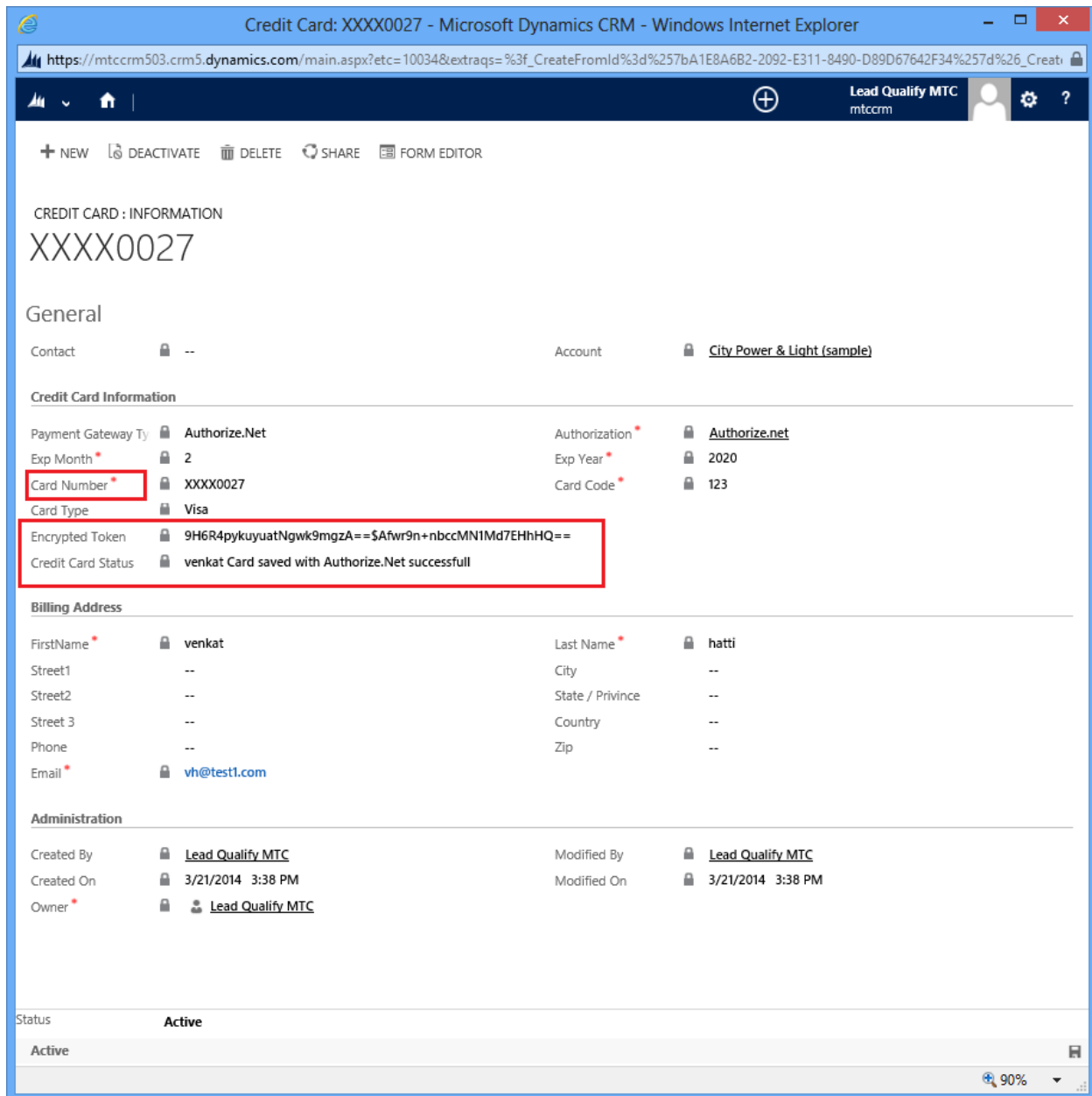
Active

90%

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.



Credit Card: XXXX0027 - Microsoft Dynamics CRM - Windows Internet Explorer

https://mtccrm503.crm5.dynamics.com/main.aspx?etc=10034&extraqs=%3f_CreateFromId%3d%257bA1E8A6B2-2092-E311-8490-D89D67642F34%257d%26_Creat

Lead Qualify MTC mtccrm

+ NEW DEACTIVATE DELETE SHARE FORM EDITOR

CREDIT CARD : INFORMATION
XXXX0027

General

Contact -- Account [City Power & Light \(sample\)](#)

Credit Card Information

Payment Gateway Ty	Authorize.Net	Authorization	Authorize.net
Exp Month	2	Exp Year	2020
Card Number	XXXX0027	Card Code	123
Card Type	Visa		
Encrypted Token	9H6R4pykuyuatNgwk9mgzA==\$Afw9n+nbccMN1Md7EHhHQ==		
Credit Card Status	venkat Card saved with Authorize.Net successfull		

Billing Address

FirstName	venkat	Last Name	hatti
Street1	--	City	--
Street2	--	State / Prvince	--
Street 3	--	Country	--
Phone	--	Zip	--
Email	vh@test1.com		

Administration

Created By	Lead Qualify MTC	Modified By	Lead Qualify MTC
Created On	3/21/2014 3:38 PM	Modified On	3/21/2014 3:38 PM
Owner	Lead Qualify MTC		

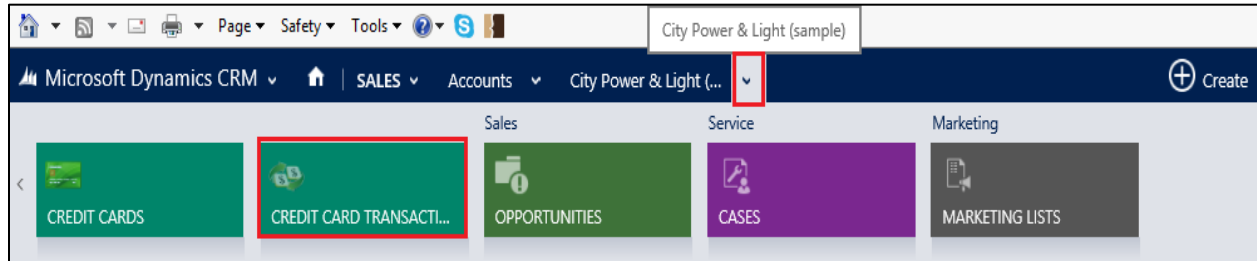
Status Active

Active

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

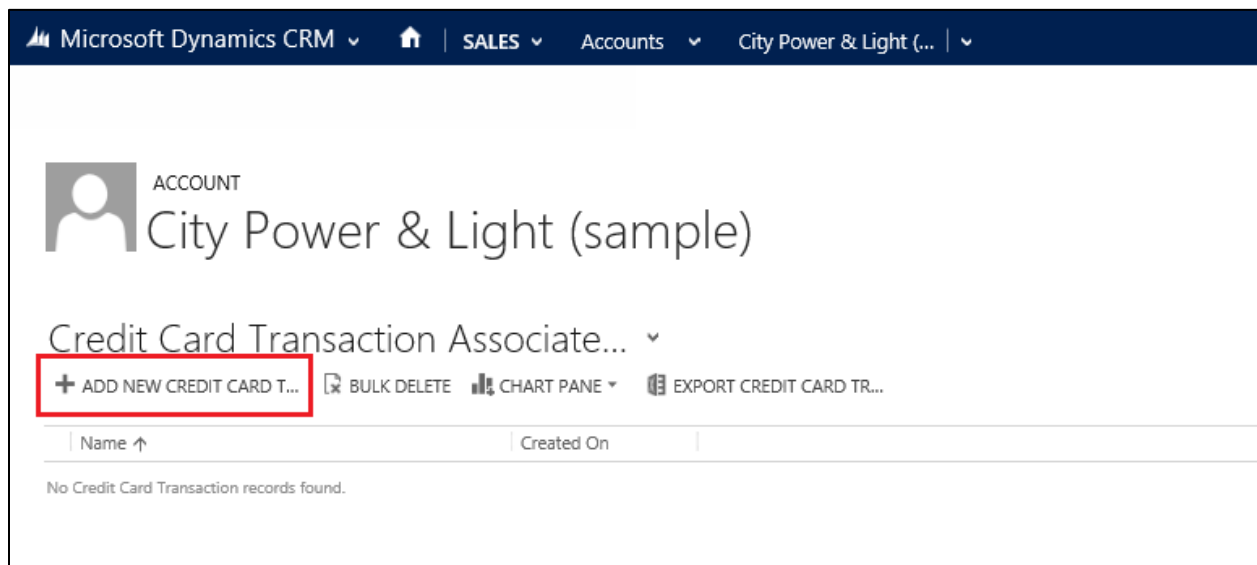


Figure 23: Add New Credit Card details

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**

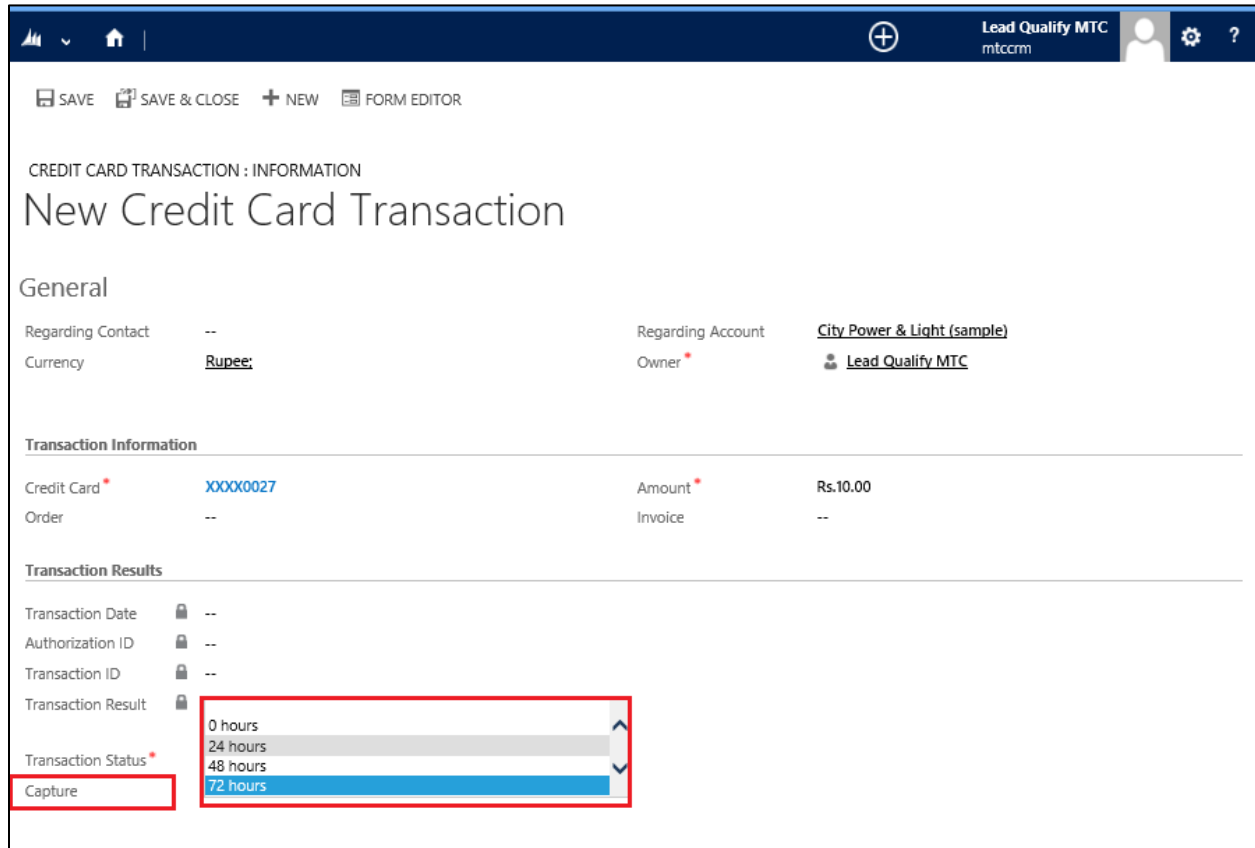


Figure 25: Credit Card transaction Status Details

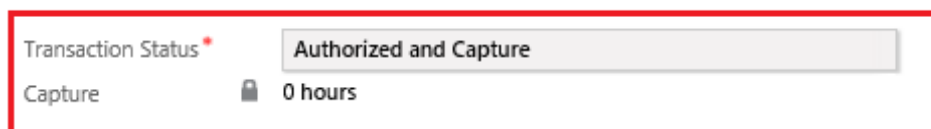
- **If Transaction Status is Authorized**

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

Credit Card Transaction: City Power & Light (sample)XXXX0027 - Microsoft Dynamics CRM - Windows Internet Explorer

https://mtccrm503.crm5.dynamics.com/main.aspx?etc=10035&extraqs=%3f_CreateFromId%3d%257bA1E8A6B2-2092-E311-8490-D89D67642F34%257d%26_Creati

Lead Qualify MTC
mtccrm

+ NEW DELETE SHARE FORM EDITOR

CREDIT CARD TRANSACTION : INFORMATION

City Power & Light (sample)XXXX0027

General

Regarding Contact -- Regarding Account City Power & Light (sample)

Currency Rupee: Owner Lead Qualify MTC

Transaction Information

Credit Card *	<u>XXXX0027</u>	Amount *	Rs.10.00
Order	--	Invoice	--

Transaction Results

Transaction Date	3/21/2014
Authorization ID	YYD5DX
Transaction ID	2208989303
Transaction Result	This transaction has been approved.

Transaction Status * **Authorized and Capture**

Capture 0 hours

Status	Active	Status Reason	Authorized
Active			

90%

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

The screenshot shows the Microsoft Dynamics CRM interface for creating a new invoice. The top ribbon has 'SALES' and 'Invoices' tabs highlighted. The 'NEW INVOICE TEST' tab is selected, and a dropdown menu is open showing the 'Credit Card' option highlighted. The form displays various fields including Invoice ID, Name, Currency, Price List, Shipping Dates, Shipping Information, Addresses, and a Summary table with amounts like Detail Amount, Pre-Freight Amount, and Total Amount.

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

Microsoft Dynamics CRM | SALES | Invoices | NEW INVOICE TEST | Create

+ NEW | DELETE | SHARE | FORM EDITOR

CREDIT CARD TRANSACTION : INFORMATION

City Power & Light (sample)XXXX0027

General

Regarding Contact: --
Currency: Rupee:

Regarding Account: City Power & Light (sample)
Owner: Lead Qualify MTC

Transaction Information

Credit Card: XXXX0027 Amount: Rs.20.00
Order: -- Invoice: NEW INVOICE TEST

Transaction Results

Transaction Date: 3/21/2014
Authorization ID: YN6UU6
Transaction ID: 2208990284
Transaction Result: This transaction has been approved.

Transaction Status: Authorized
Capture: --

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

Transaction Results

Transaction Date: 3/21/2014
Authorization ID: YN6UU6
Transaction ID: 2208990284
Transaction Result: This transaction has been approved.

Transaction Status: Authorized
Capture: --

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

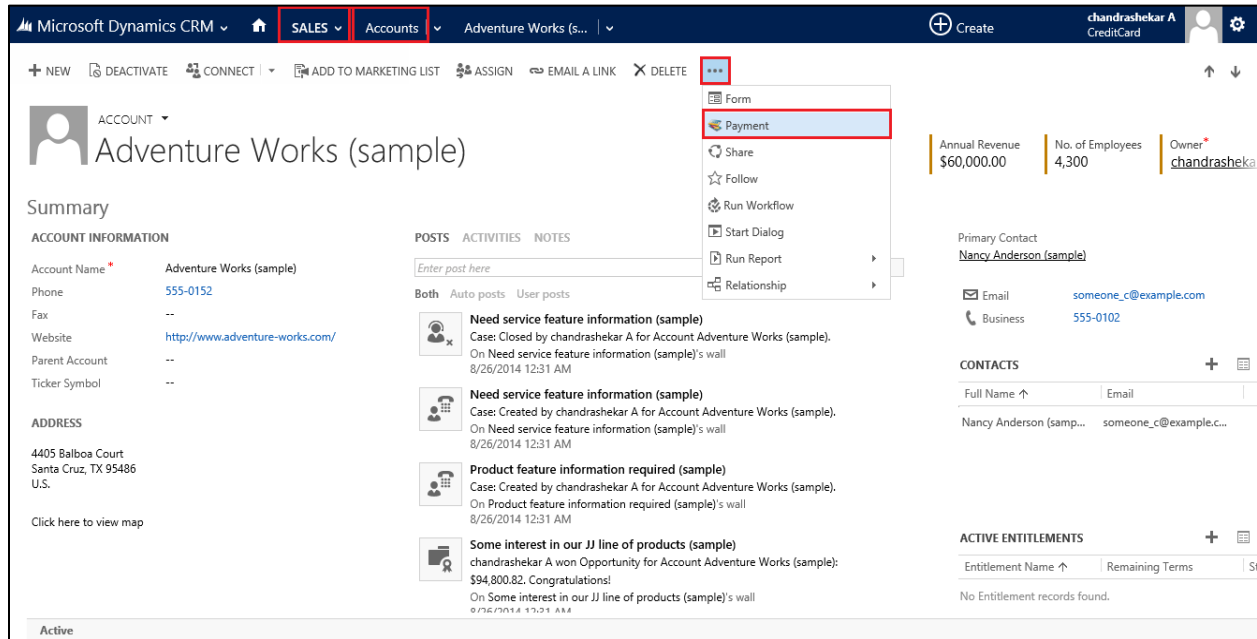
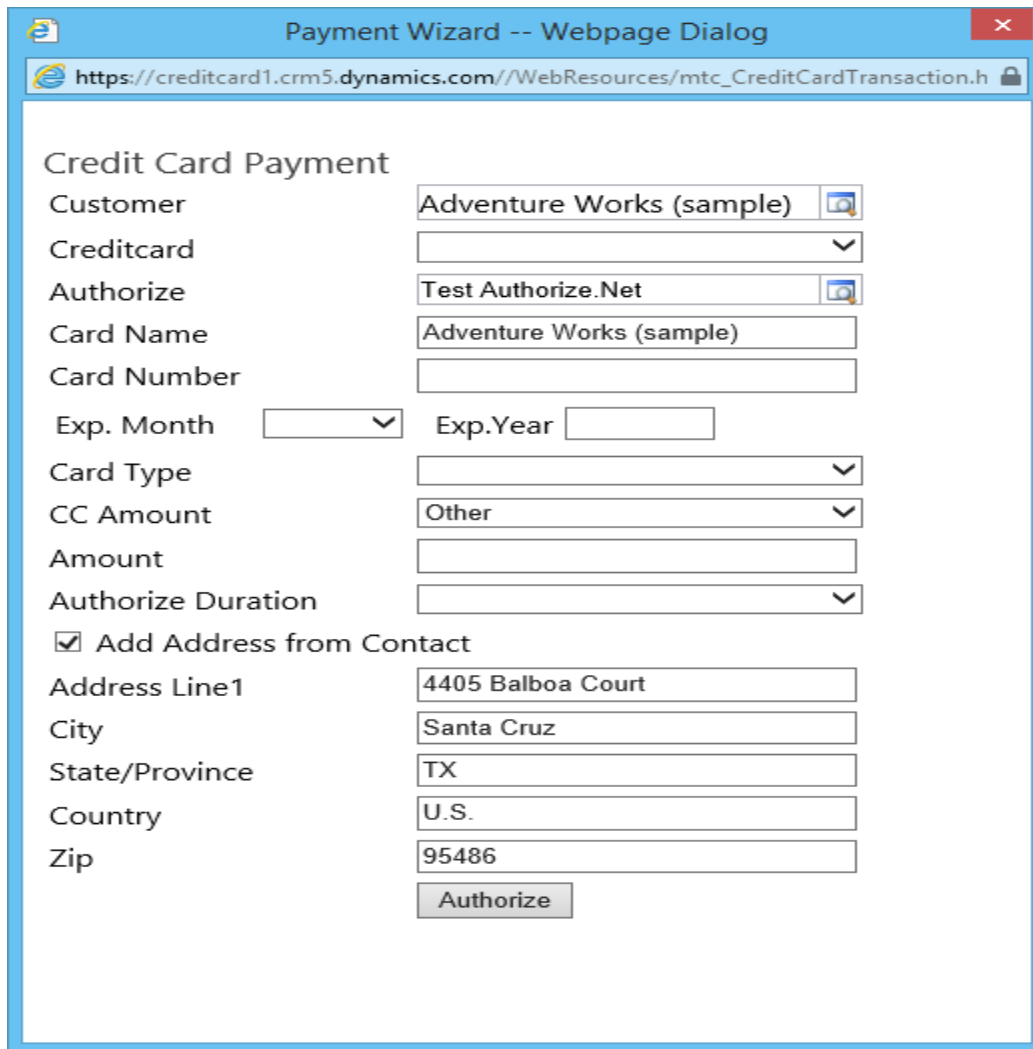


Figure 30: Account for showing payment option

- 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



Payment Wizard -- Webpage Dialog

https://creditcard1.crm5.dynamics.com/WebResources/mtc_CreditCardTransaction.h

Credit Card Payment

Customer: Adventure Works (sample)

Creditcard: [Dropdown]

Authorize: Test Authorize.Net

Card Name: Adventure Works (sample)

Card Number: [Text Box]

Exp. Month: [Dropdown] Exp. Year: [Text Box]

Card Type: [Dropdown]

CC Amount: Other [Dropdown]

Amount: [Text Box]

Authorize Duration: [Dropdown]

☒ Add Address from Contact

Address Line1: 4405 Balboa Court

City: Santa Cruz

State/Province: TX

Country: U.S.

Zip: 95486

Authorize

Figure 31: Payment Wizard

- Select Authorize Duration from the Drop Down list provided

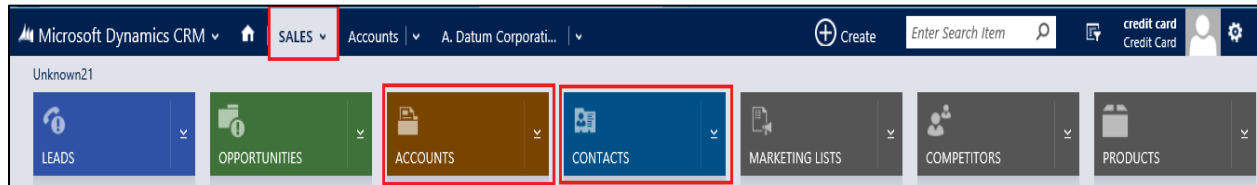
0 Hours	For Immediate processing
24 Hours	Card will be charged after 24 hours (till such time it will be in Pending)
48 Hours	Card will be charged after 48 hours (till such time it will be in Pending)
72 Hours	Card will be charged after 72 hours (till such time it will be in Pending)

- 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)

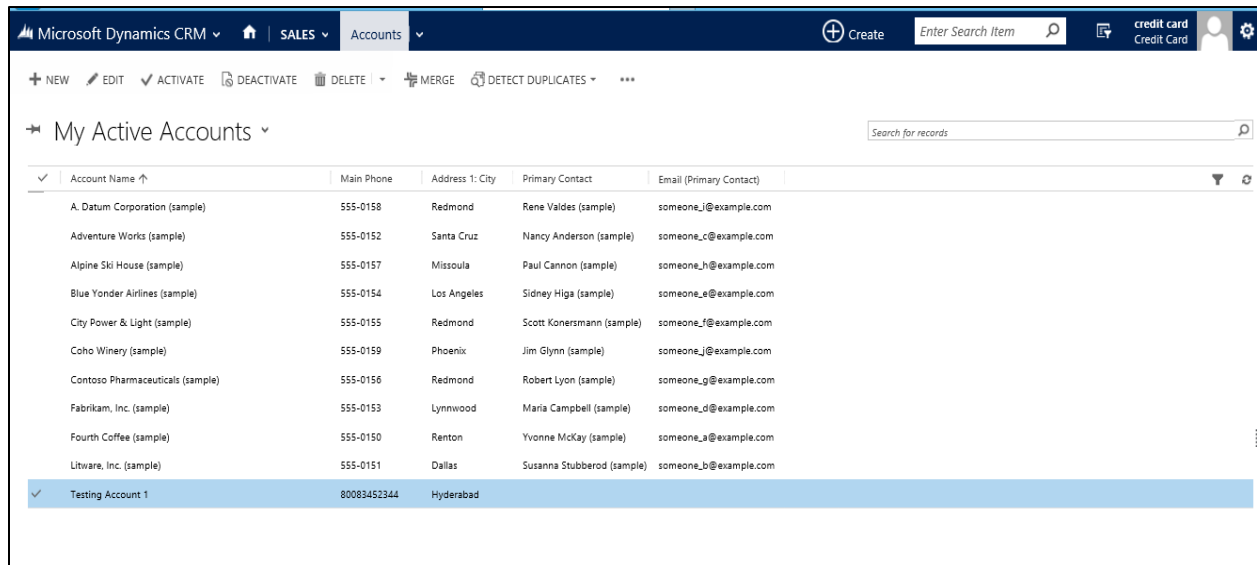
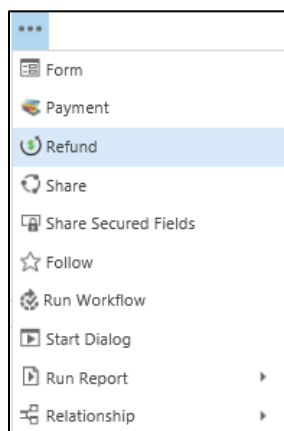


Figure 32: CRM My Active Accounts

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



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

Microsoft Dynamics CRM | SALES | Accounts | Testing Account 1 | Create | Enter Search Item | credit card | Credit Card

ACCOUNT | Testing Account 1

Summary

ACCOUNT INFORMATION

Account Name * Testing Account 1

Phone 80083452344

Fax --

Website <http://www.mtcccp.com>

Parent Account --

Ticker Symbol --

ADDRESS

POSTS ACTIVITIES NOTES

Enter post here

Both Auto posts User posts

Testing Account 1

Account: Created By credit card.

On Testing Account 1's wall

Today

Annual Revenue --

No. of Employees --

Owner * credit card

Primary Contact --

CONTACTS

Full Name ↑ Email

No Contact records found.

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

Refund Form

Credit card Number

Customer Name

Description

Transaction Id	Invoice	Payment Ammount	Settled On	Result
<input type="checkbox"/> 2232304045		1220.0000	21/04/2015	
<input type="checkbox"/> 2232304069		1300.0000	21/04/2015	

Refund

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

Refund Form

Credit card Number

Customer Name

Description

	Transaction Id	Invoice	Payment Ammount	Settled On	Result
<input checked="" type="checkbox"/>	2232304045		1220.0000	21/04/2015	succeeded
<input type="checkbox"/>	2232304069		1300.0000	21/04/2015	

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.

Credit Card Transaction: test accountXXXX8888 - Microsoft Dynamics CRM - Windows Internet Explorer

NEW DELETE SHARE FORM EDITOR

CREDIT CARD TRANSACTION : INFORMATION
test accountXXXX8888

General

Regarding Contact: -- Regarding Account: test account
Currency: US Dollar Owner: Crm admin

Transaction Information

Credit Card: XXXX8888 Amount: \$1,255.00
Order: -- Invoice: --

Transaction Results

Transaction Date: 4/20/2015
Authorization ID: FRTS8R
Transaction ID: 2232213739
Transaction Result: This transaction has been approved.

Status: Inactive Status Reason: Refunded

Inactive Read only

Figure 36: CC Transaction Showing Refund Status

Refund: 2232284205 - Microsoft Dynamics CRM - Windows Internet Explorer

WORKPLACE Accounts 2232284205

DELETE FORM EDITOR

REFUND : INFORMATION
2232284205

General

Name: 2232284205
Account: test account
Contact: --
Reference Transaction: 2232213739
Credit Card: XXXX8888
Transaction: test accountXXXX8888
Refund Amount: \$1,255.00
Invoice Number: --
Description: --
Owner: Crm admin

NOTES

Enter a note
No Notes found.

Inactive Read only

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.

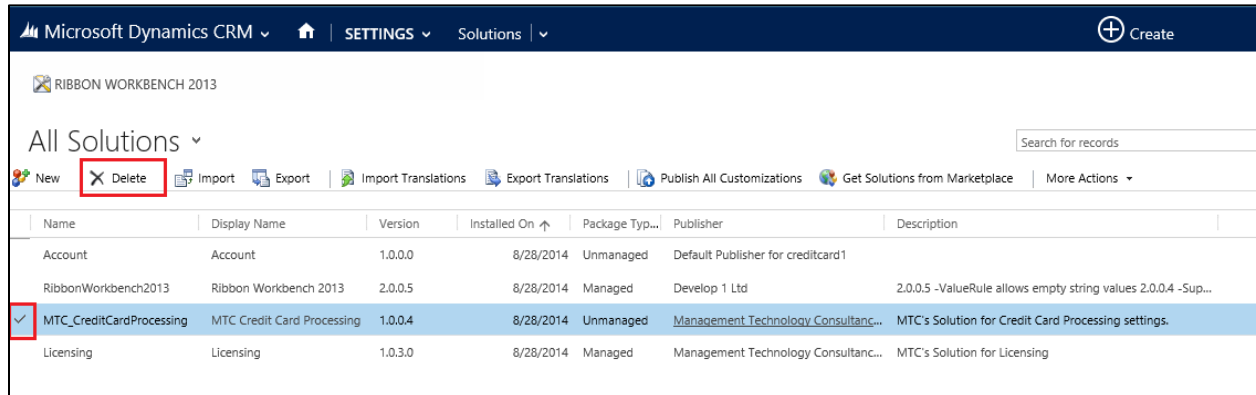


Figure 38: Deleting Credit Card processing Solution

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

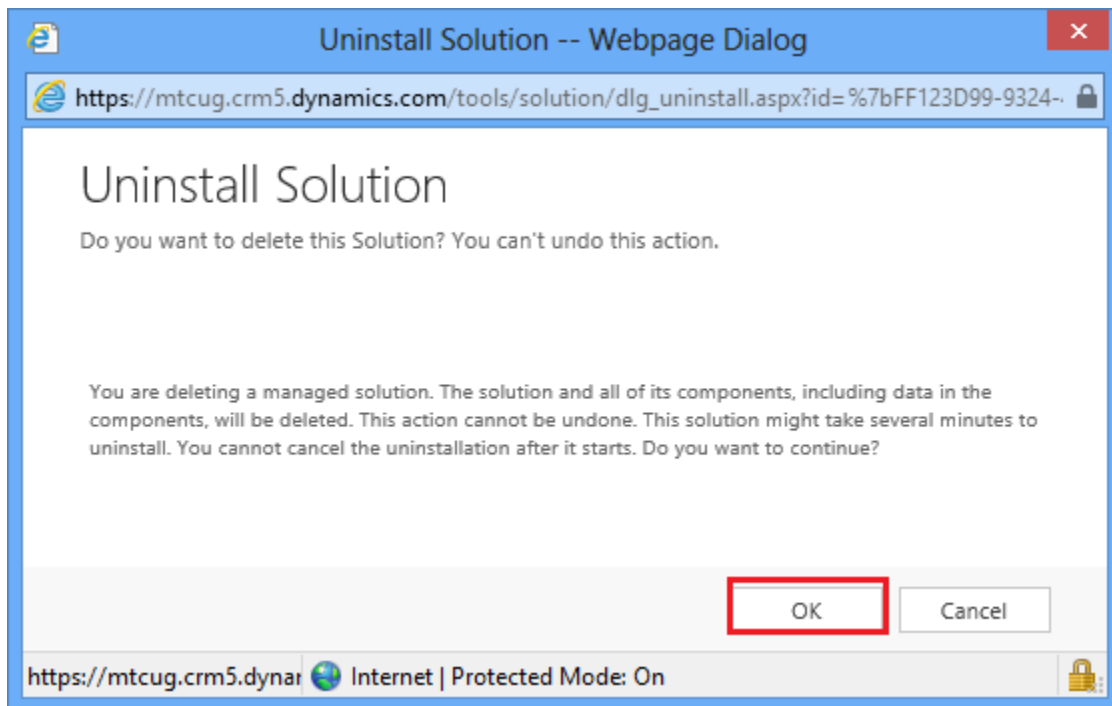


Figure 39: Uninstall Solution

- 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.

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