

User Guide



Document Version: 1.0

Solution Version: 20152016_062016_1_0_managed



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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 transactions made easier and quicker. The credit card details stored 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.

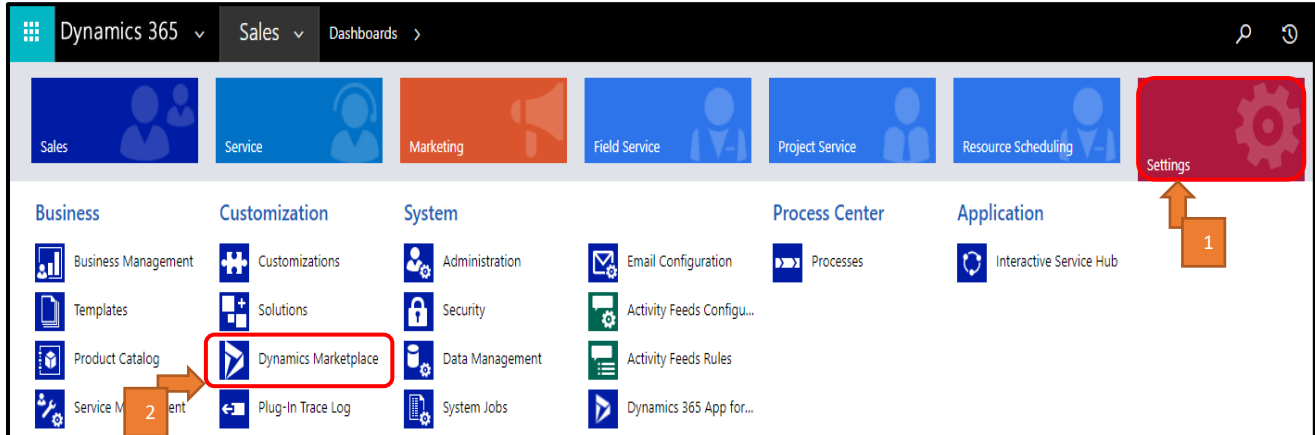
- Store customer credit card information securely within CRM field level security. Or for greater compliance to Visa card regulations and best practice standards, keep customer credit card information out of your company, remove liability and responsibility, but maintain accessibility to your customer order funding credit card information your selling transaction processes via the optional Authorize.Net Customer Information Manager (CIM) service.
- CIM allows Authorize.Net to securely store your customer's critical credit card information in their cloud without your CRM, or your company actually ever having it.
- Access CIM customer secure data from CRM automatically, seamlessly, again securely as needed anytime, even repetitive monthly transactions.
- Processing credit card payment made easy, simple for Microsoft Dynamics CRM. The credit card details store in CRM are encrypted to avoid any misuse of data. The merchants can fulfill the process of Sales at ease. Merchants also make Refund of payments either from Account or from Contact in CRM.
- AVS or Address Verification Service used by banks and associated credit card processors to reduce risk of fraud and offers a lower processing rate.
- The service is available widely in North America and Europe, and larger banks globally. AVS is a toggle either enabled or disabled, prior to transactions where address information is required in the transaction.
- Set recurring bill cycle and charge your customers accordingly with least time and effort involved.
- This is important to most organizations that take high value or high volume credit card transactions because if AVS is Used a lower transaction percentage fee is applied to each applicable transaction.

How to Install Credit Card Processing?

To **Install** MTC's Credit Card Processing Add-on solution into your Dynamics 365, please follow the below instructions.

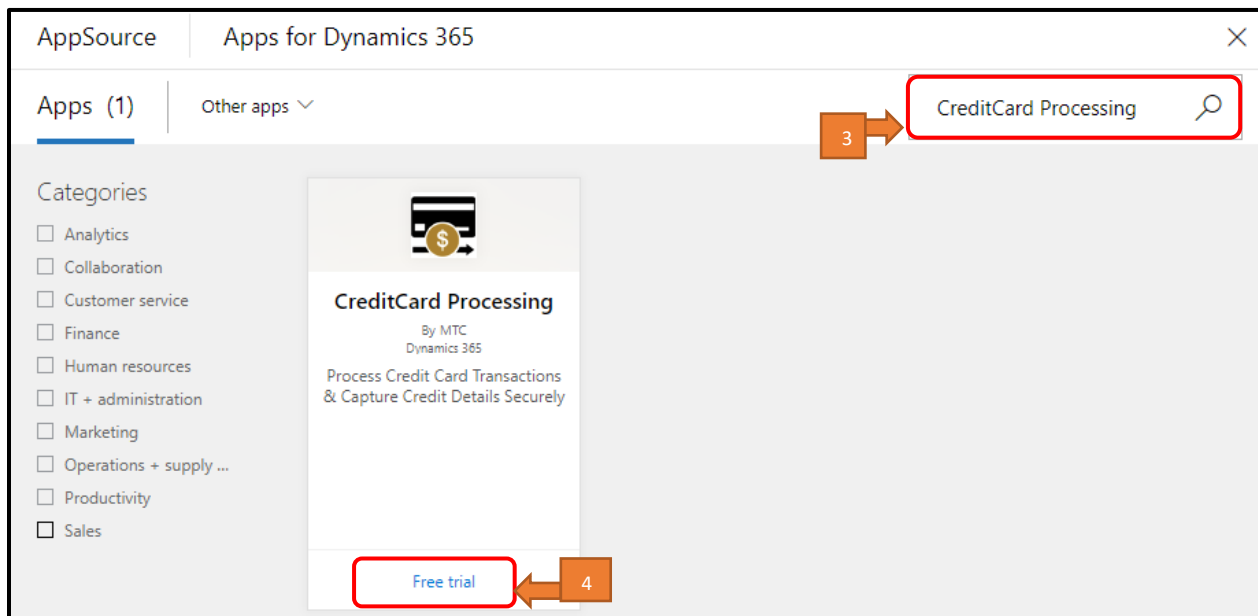
Step1:

- Navigate to **Dynamics 365 -> Settings** and click on **Dynamics Marketplace**.



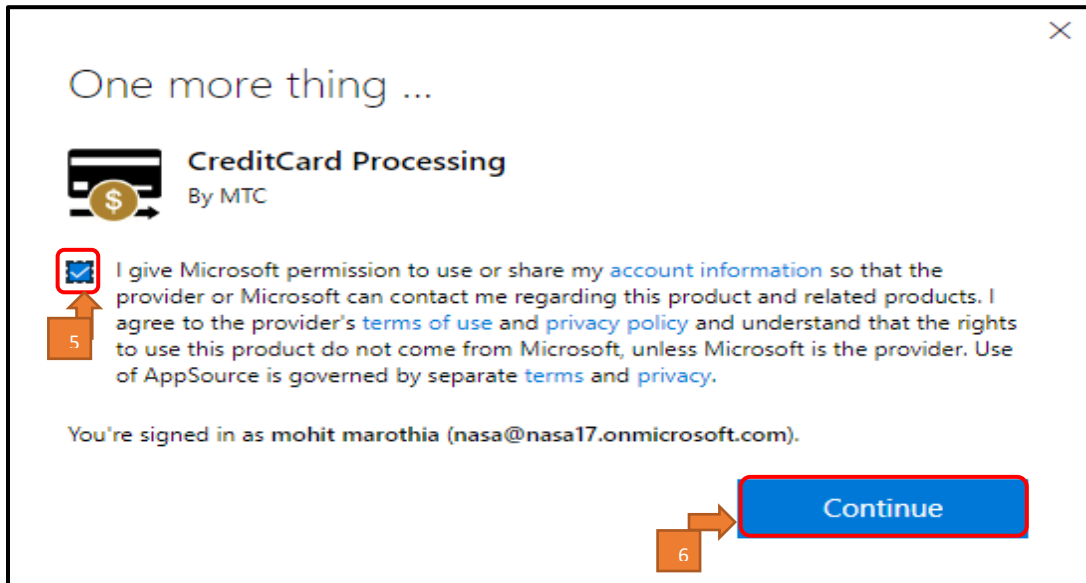
Step2:

- In search box search for **Credit Card Processing by MTC** and click on **free trial**.




Step3:

- Please check on the **Check Box** to give permissions and click on **Continue**.



One more thing ...

 **CreditCard Processing**
By MTC

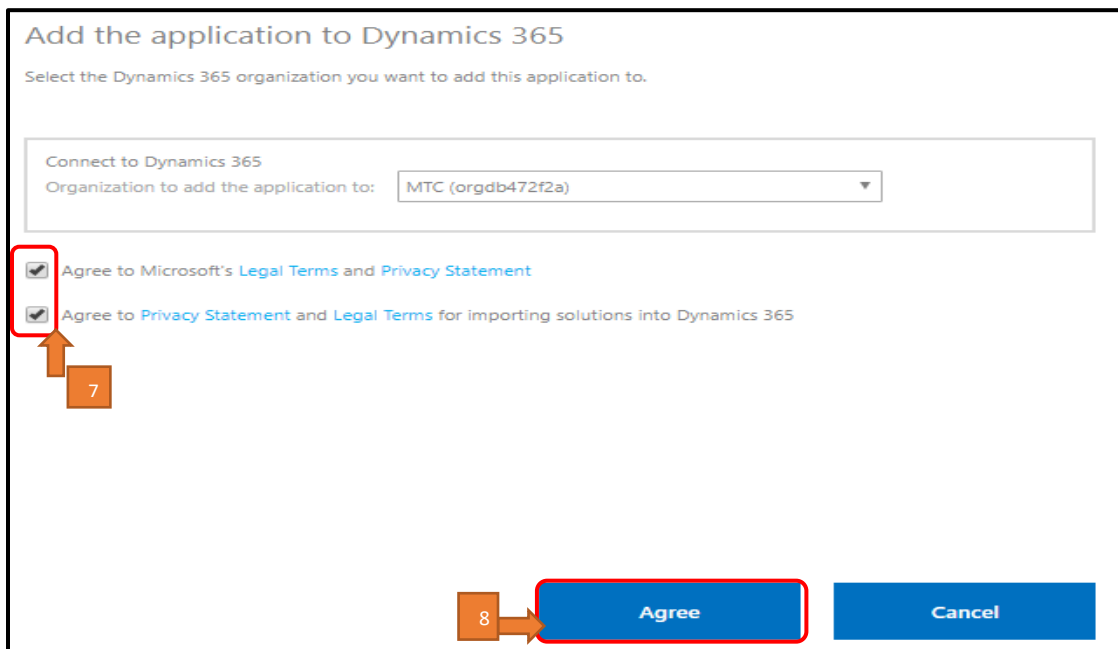
☒ I give Microsoft permission to use or share my [account information](#) so that the provider or Microsoft can contact me regarding this product and related products. I agree to the provider's [terms of use](#) and [privacy policy](#) and understand that the rights to use this product do not come from Microsoft, unless Microsoft is the provider. Use of AppSource is governed by separate [terms](#) and [privacy](#).

You're signed in as **mohit marothia** ([nasa@nasa17.onmicrosoft.com](#)).

Continue

Step4:

- Please check the two check boxes to agree **Microsoft Legal Terms and conditions** and agree to **Privacy Statement and Legal Terms** and click on **Agree** for importing the solution.



Add the application to Dynamics 365

Select the Dynamics 365 organization you want to add this application to.

Connect to Dynamics 365
Organization to add the application to: MTC (orgdb472f2a)

☒ Agree to Microsoft's [Legal Terms](#) and [Privacy Statement](#)

☒ Agree to [Privacy Statement](#) and [Legal Terms](#) for importing solutions into Dynamics 365

Agree **Cancel**

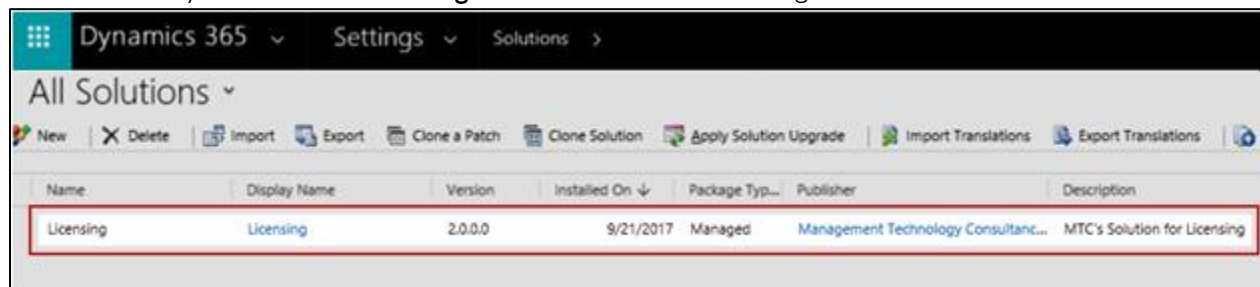
Step5:

- After clicking on agree the **Installation Process Begins**.

MTC Credit Card Processing	2016.122016.2.0	1/1/2050	Installation pending
Office 365 Groups	2.7.0.0	1/1/2050	Not installed
Project Service Automation	1.2.1.56	1/1/2050	Not installed

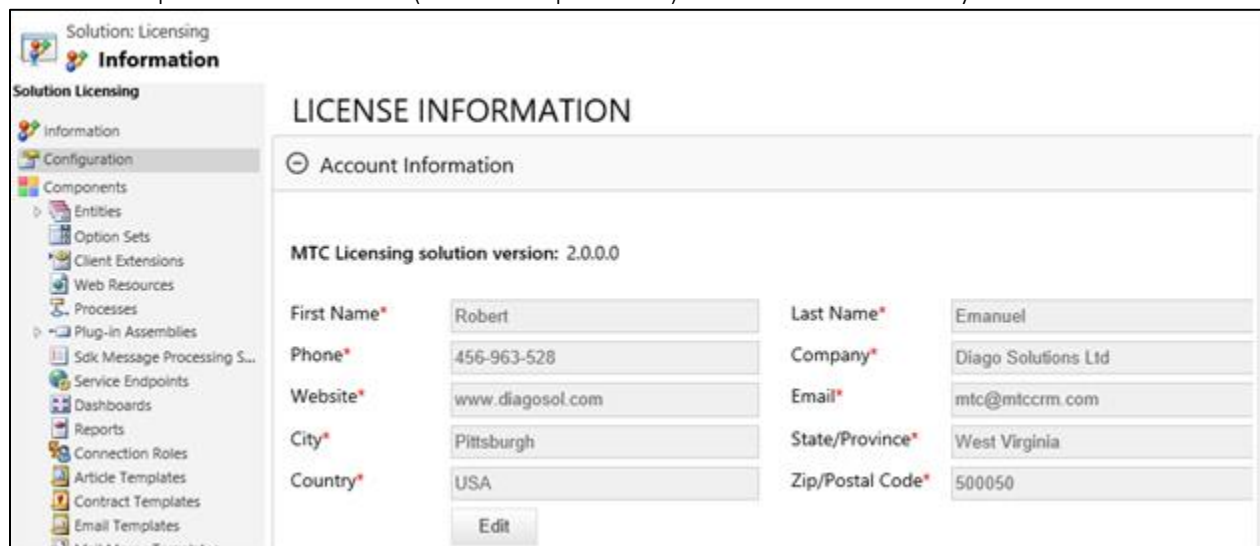
Step6:

- After the installation is complete, the status changes to Installed.
- Go to **CRM → Settings → Solutions**. This CRM access and these steps require the Administrator Security Role. Click on **licensing solution** for the Account Registration window.



Name	Display Name	Version	Installed On	Package Type	Publisher	Description
Licensing	Licensing	2.0.0.0	9/21/2017	Managed	Management Technology Consultanc...	MTC's Solution for Licensing

- Complete the field details (Refer example below). All fields are mandatory. Click Submit.



Solution: Licensing

Information

Solution Licensing

LICENSE INFORMATION

Account Information

MTC Licensing solution version: 2.0.0.0

First Name*	Robert	Last Name*	Emanuel
Phone*	456-963-528	Company*	Diago Solutions Ltd
Website*	www.diagosol.com	Email*	mtc@mtccrm.com
City*	Pittsburgh	State/Province*	West Virginia
Country*	USA	Zip/Postal Code*	500050

Edit

- The Account Registration window refreshes automatically and loads up with more section details such as such as Activated Bundle Products, Activated Products and Download More Products.

LICENSE INFORMATION										
Account Information										
Activated Bundle Products										
Activated Products										
Product Name	Version / Update	Installed On	Expiry Date	Purchase License	Generate License	License Key	License Type	Enabled Users	Licensed Users	User Guide
Activity Timer	265.082017.3.3	Oct 2, 2017	Oct 11, 2017			fd-gkPz2UH9aMaxB656EXB40thqle...	Trial	3	0	
Calendar Pro	265.092017.3.4	Oct 6, 2017	Oct 21, 2017			fd-gkPz2UH9aMaxB656EXB40thqle...	Trial	3	0	
MTC_CreditCardProcessing	20152016.062016.1.0	Sep 25, 2017						3		
Email To Case	20152016.062016.1.0	Sep 28, 2017						3		
Super Grid	2016.062017.4.8	Sep 25, 2017	Oct 13, 2017			fd-gkPz2UH9aMaxB656EXB40thqle...	Trial	3	0	
Download More Products										

- All MTC products downloaded are shown in “Activated Products” or “Activated Bundled Products.”
- You can see MTC’s Customer Survey installed date and expiry date along with purchasing options.


Generating Free Trial

- There are 2 ways to generate 15 day free trial license key for MTC’s Credit Card Processing:

a. Click on Key Icon under Generate License of Activated Products for MTC’s Credit Card Processing.

LICENSE INFORMATION										
Account Information										
Activated Bundle Products										
Activated Products										
Product Name	Version / Update	Installed On	Expiry Date	Purchase License	Generate License	License Key	License Type	Enabled Users	Licensed Users	User Guide
Activity Timer	265.082017.3.3	Oct 2, 2017	Oct 11, 2017			fd-gkPz2UH9aMaxB656EXB40thqle...	Trial	3	0	
Calendar Pro	265.092017.3.4	Oct 6, 2017	Oct 21, 2017			fd-gkPz2UH9aMaxB656EXB40thqle...	Trial	3	0	
MTC_CreditCardProcessing	20152016.062016.1.0	Sep 25, 2017						3		
Email To Case	20152016.062016.1.0	Sep 28, 2017						3		
Super Grid	2016.062017.4.8	Sep 25, 2017	Oct 13, 2017			fd-gkPz2UH9aMaxB656EXB40thqle...	Trial	3	0	
Download More Products										

You will see a window with 3 options. Select “I want to start my one-time 15 day free trial” and click "Get Trial." Your 15 day free trial will be generated and updated in the Activated Products tab.



☒ I want to start my one-time 15 day free trial
☐ I purchased the product from MTC Web Portal
☐ I want to manually enter the license key provided by MTC Team

PS: For extension of trial period please write to salesteam@mtccrm.com

b. Alternatively, the 15 day free trial license key will be generated by the first use of the product, allowing delay or an alternate User to start the trial with the appropriate Product's Security Role. The free trial license key will be generated and updated in the Activated Products tab.

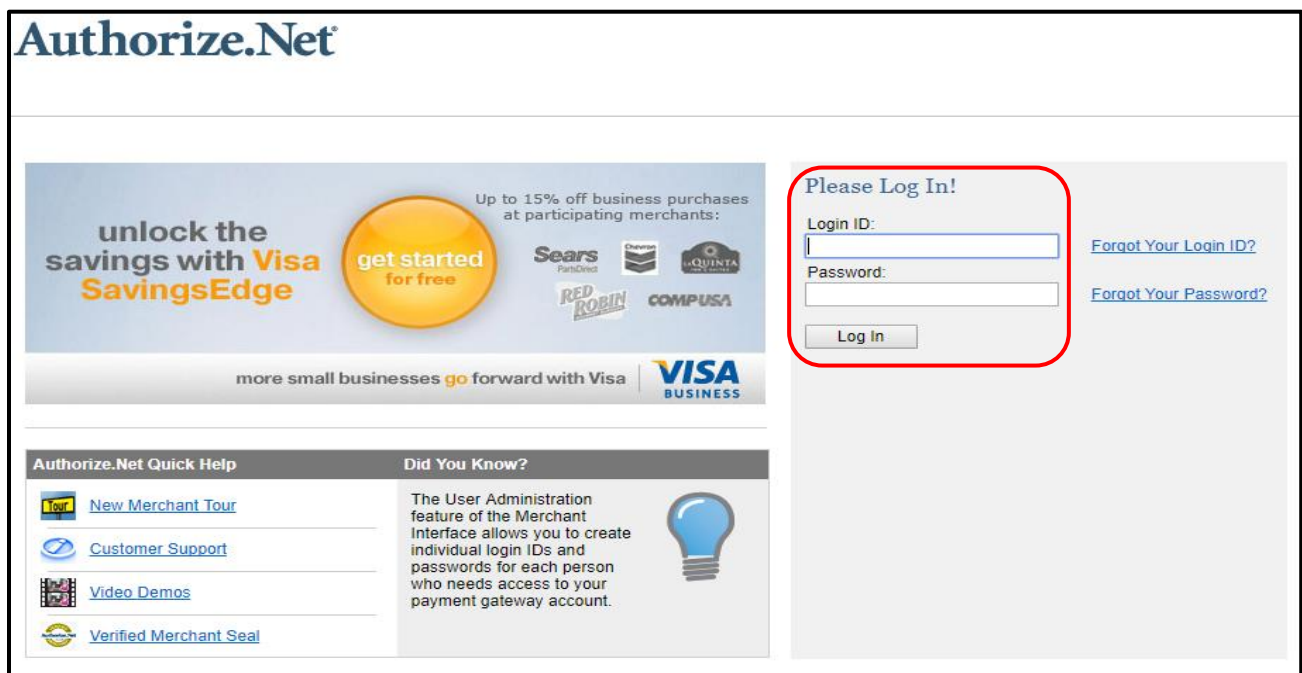
- To purchase this product, click on “**cart icon**” under purchase license and follow the series of steps as guided by the system. For any queries, write down to Salesteam@mtccrm.com

Configuration of Credit Card Processing

Step1:

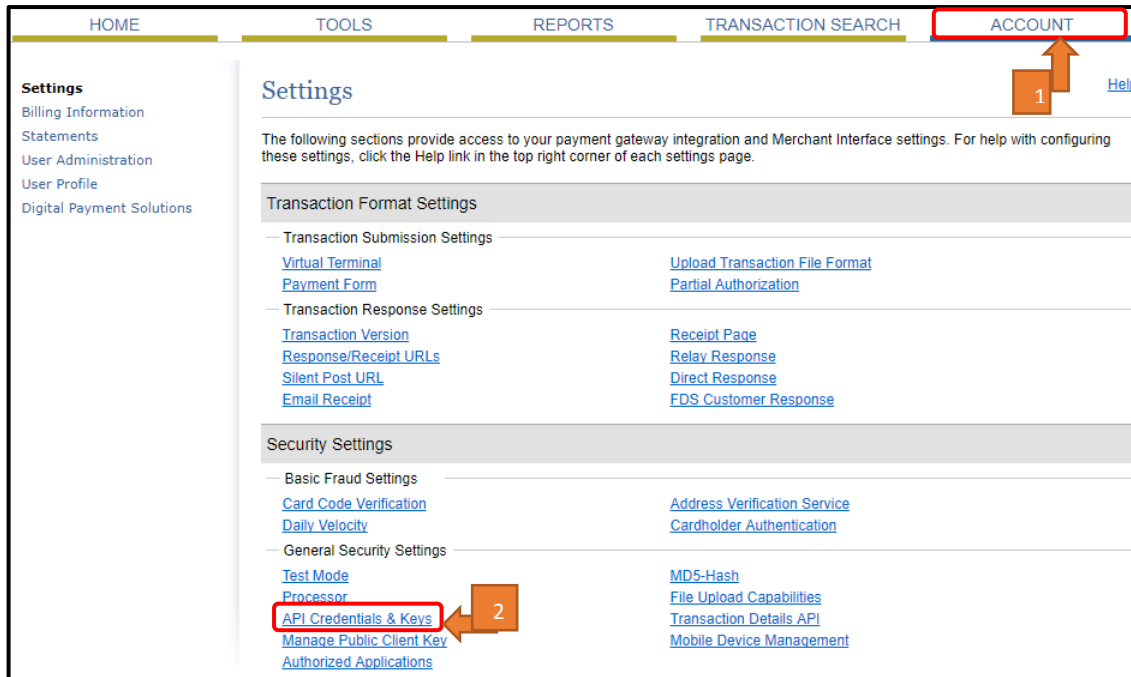
Register with Authorize.net

- The user has to register with Authorize.net a gateway solution. First get **API Login code** and **API Transaction Key**. Unless these codes are obtained from Authorize.net the user cannot process the credit card processing solution.
- Login to <https://account.authorize.net/>



Step2:

- If you want to change API Login Key or API Transaction Key, click on **ACCOUNT**.
- Click on **API Credentials & keys** to change the API Login Key and API Transaction Key.



HOME **TOOLS** **REPORTS** **TRANSACTION SEARCH** **ACCOUNT** [Help](#)

Settings
 Billing Information
 Statements
 User Administration
 User Profile
 Digital Payment Solutions

Settings

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](#)
 - [Processor](#)
 - [API Credentials & Keys](#)
 - [Manage Public Client Key](#)
 - [Authorized Applications](#)
 - [MD5-Hash](#)
 - [File Upload Capabilities](#)
 - [Transaction Details API](#)
 - [Mobile Device Management](#)

Step3:

- API login ID is shown against its column along with the other details like Login ID last Obtained and Transaction Key last obtained.
- Fill up your **Secret Answer** which has been auto generated when u signed up in Authorized.net
- Click on **Submit**.

HOME
TOOLS
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TRANSACTION SEARCH
ACCOUNT

Settings
Billing Information
Statements
User Administration
User Profile
Digital Payment Solutions

API Credentials & Keys [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.

A Signature Key is applicable if your solution uses our hosted payment form, or uses the Direct Post Method (DPM) to submit transactions. It is also used for authenticating transaction responses from our APIs, including but not limited to Relay Response and Silent Post.

IMPORTANT: The API Login ID, Transaction Key and Signature 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, Transaction Key and Signature Key, please refer to the [Reference & User Guides](#) or contact your Web developer.

API Login ID: 2Ld5Mq7W
API Login ID Last Obtained: 09/21/2017 23:20:37
Transaction Key Last Obtained: 09/21/2017 23:21:00

Create New Key(s)

* Required Fields

You may obtain a new Transaction Key or Signature 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 Immediately or Disable Old Signature Key Immediately option. If you do not immediately disable the old value, it will automatically expire in 24 hours.

Secret Question: What is your pet's name?
Secret Answer: *
Obtain: ☐ New Transaction Key ☐ New Signature Key

Step4:

- Navigate to **TOOLS** → **Customer Information Manager**, to see all the transactions made by the credit card.

Authorize.Net
Welcome: TestFirstName TestLastName


HOME
TOOLS
REPORTS
TRANSACTION SEARCH
ACCOUNT

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

Customer Information Manager [Help](#)

Use the Customer Information Manager (CIM) to create and manage customer profiles and/or use the CIM API Guide in the [Integration Center](#) to integrate CIM to your website or proprietary business application.

Note: Integrating the CIM API to your Web site requires the expertise of a Web developer. If you need help we recommend contacting an [Authorize.Net Certified Developer](#).


Account Updater
The Account Updater service works with CIM to keep the credit card information on file up to date for your customers' stored payment profiles.
[Learn more!](#)

-- Select One --

 [Advanced Search](#)

+ Add Profile | View Profile | Delete Profile

1-2 of 2 results

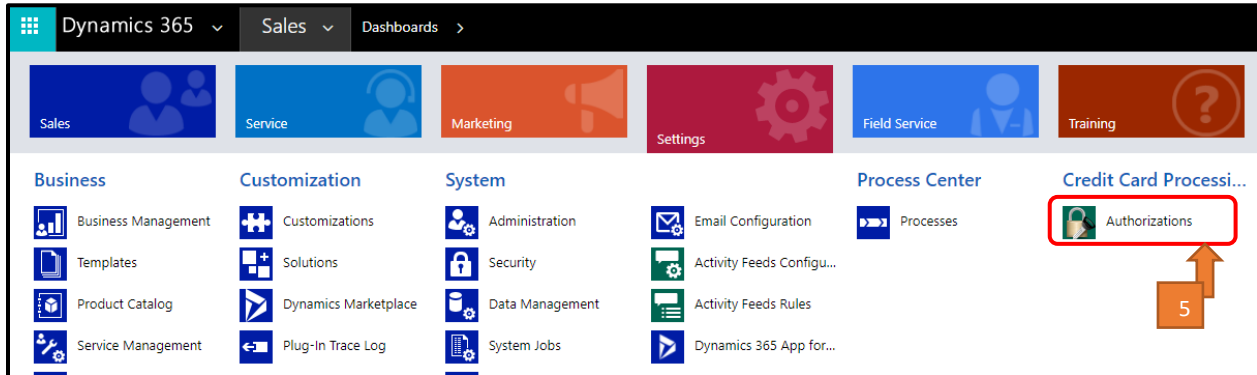
Created Date	Profile ID	Customer ID	Email	Description
22-Sep-2017 00:35:55	1813117356	1813117356		mohit mohit 1676
22-Sep-2017 00:05:57	1813116981	1813116981		mohit agarwal 1111

1-2 of 2 results

Show: 25 results per page

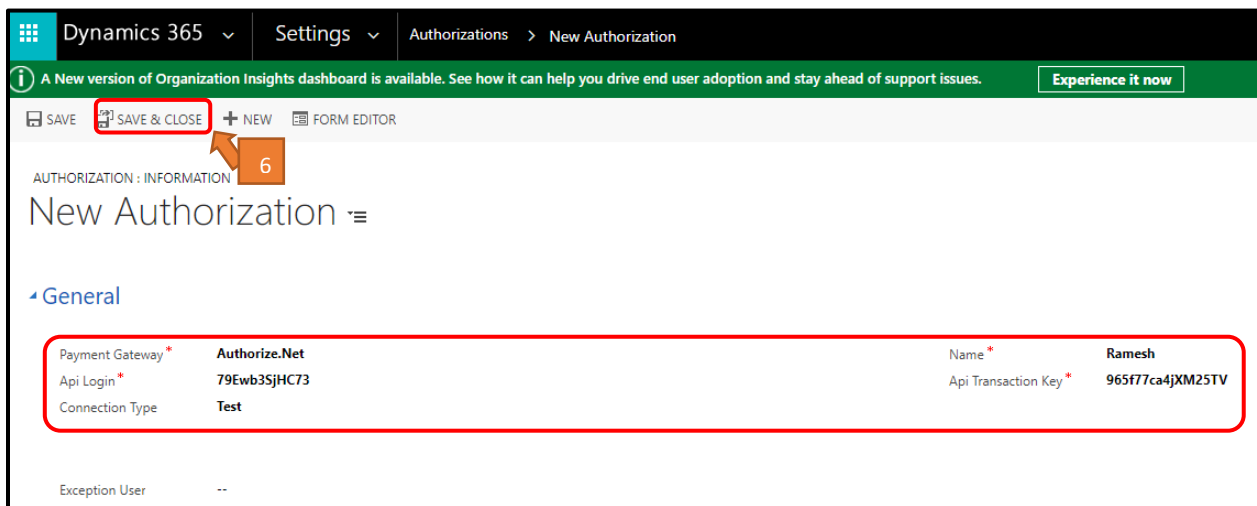
Step5:

- Store and Record API Login ID and Transaction Key details.
- Navigate to **Dynamics365->Settings->Credit Card Processing->Authorizations.**



Step6:

- Fill up the required details along with **Api Login Key** and **Api Transaction key**.
- Click on **SAVE & CLOSE**.



SAVE & CLOSE + NEW FORM EDITOR

AUTHORIZATION : INFORMATION

New Authorization

General

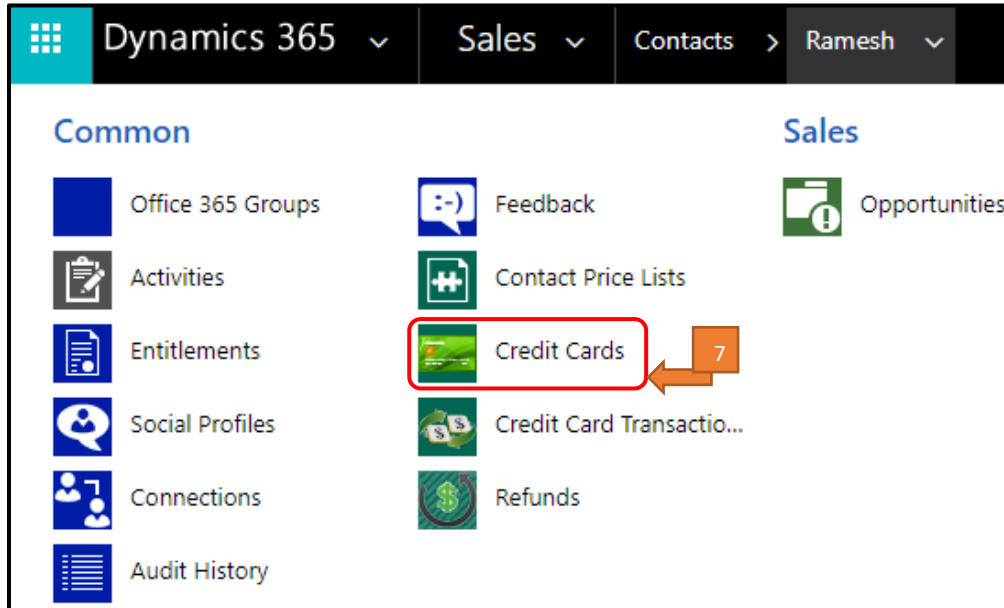
Payment Gateway *	Authorize.Net	Name *	Ramesh
Api Login *	79Ewb35JHC73	Api Transaction Key *	965f77ca4jXM25TV
Connection Type	Test		

Exception User --

Procedure to add Credit Card to customer

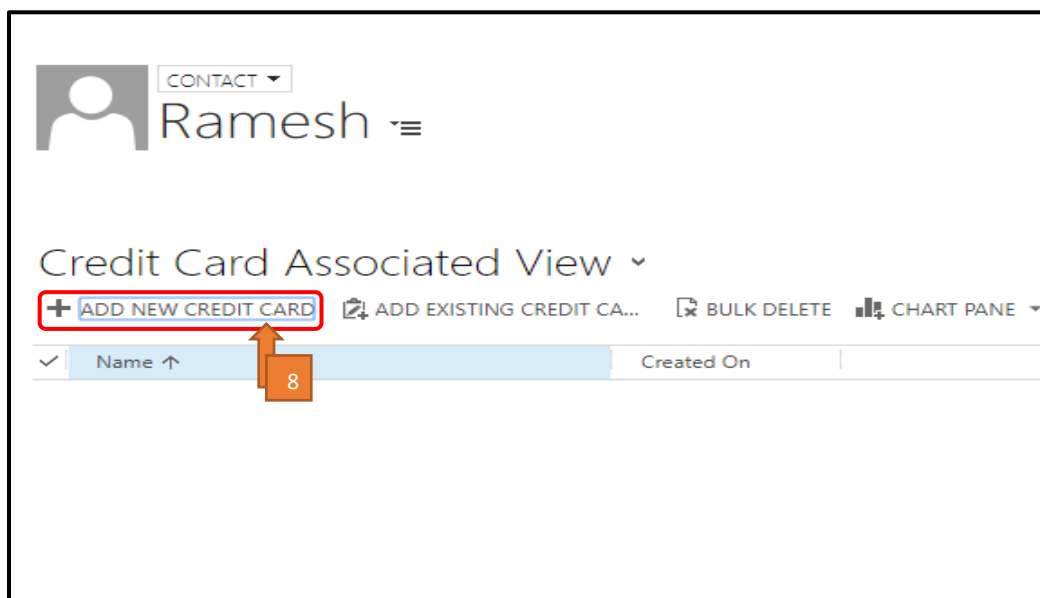
Step7:

- For example, let's find out how Credit Card Processing work on "Contact entity."
- Create a new **Contact** and from the navigation panel click on **Credit Card**.



Step8:

- Click on **ADD NEW CREDIT CARD**.



Step9:

- A new window will appear to add new credit card details.
- Fill up the required Credit Card details, such as:
- 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 up the credit card information and Billing Address Information, (The fields marked with a * are required) then choose a Payment Gateway to store the card with.
- After click on **Save**.
- After the details has been saved **Encrypted Token** and **Credit Card Status** is being auto generated.

CREDIT CARD : INFORMATION

XXXX1111 ☰

General

Contact	🔒 Ramesh	Account	🔒 --
---------	----------	---------	------

Credit Card Information

Payment Gateway Typ	🔒 Authorize.Net	Authorization *	🔒 Ramesh
Exp Month *	🔒 12	Exp Year *	🔒 2020
Card Type	🔒 Visa	CVV *	🔒 365
Card Number *	🔒 XXXX1111		

Encrypted Token	🔒 ZW45OKyQJyleKUtY5iSxTw== \$n3jxyRC1IB+5PV9GCePDuw==
Credit Card Status	🔒 Agarwal Card saved with Authorize.Net successfull

Billing Address

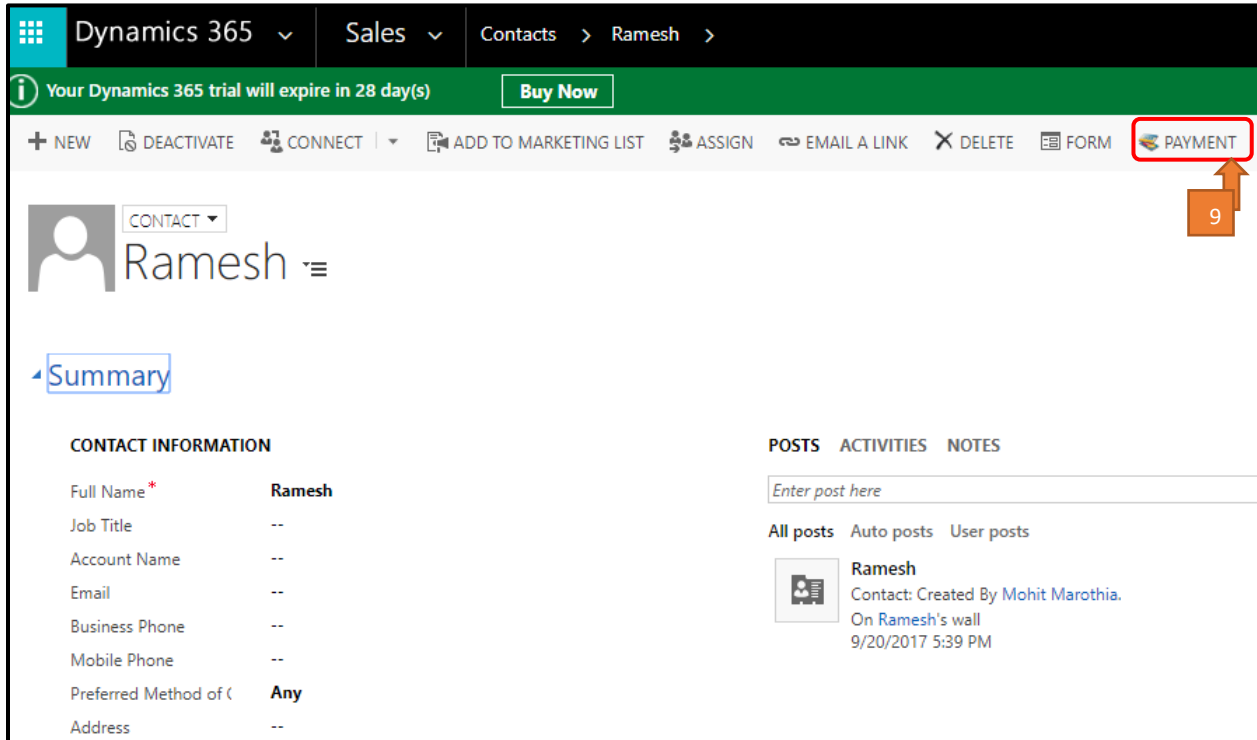
FirstName *	🔒 --	Last Name *	🔒 Ramesh
Street1	--	City	--
Street2	--	State / Province	--
Street 3	--	Country	--
Phone	--	Zip	--
Email	🔒 --		

Credit Card Processing Functionality

Step10:

Credit Card Processing on Contacts

- Navigate to **Dynamics365→Sales→Contacts**, and choose any customer to whom you want to do payments.
- Click on **Payment Ribbon Button**.



The screenshot shows the Dynamics 365 interface for a contact named Ramesh. The top navigation bar includes 'Dynamics 365', 'Sales', and 'Contacts > Ramesh >'. A green banner at the top indicates 'Your Dynamics 365 trial will expire in 28 day(s)' with a 'Buy Now' button. The ribbon contains several buttons: '+ NEW', 'DEACTIVATE', 'CONNECT', 'ADD TO MARKETING LIST', 'ASSIGN', 'EMAIL A LINK', 'DELETE', 'FORM', and 'PAYMENT'. The 'PAYMENT' button is highlighted with a red box and has a notification badge with the number 9. Below the ribbon, the contact's name 'Ramesh' is displayed. The 'Summary' tab is selected, showing 'CONTACT INFORMATION' on the left and 'POSTS', 'ACTIVITIES', and 'NOTES' on the right. The 'CONTACT INFORMATION' section lists fields like Full Name, Job Title, Account Name, Email, Business Phone, Mobile Phone, Preferred Method of Contact, and Address. The 'POSTS' section shows a post by Ramesh, created by Mohit Marothia, on 9/20/2017 at 5:39 PM.

Step11:

- A new window will open for the last confirmation of payments.
- All the credit card details were automatically added.
- Once all the details is been added click on **Authorize**.
- You will get a message as “**This transaction has been approved**”.

Credit Card Payment

Customer

Ramesh

Creditcard

XXXX1111

Authorize

vvv

Card Name

null Ramesh

Card Number

XXXX1111

Exp. Month

12

Exp. Year

2020

Card Type

Visa

Currency

US Dollar

Price List

CRM Service USA (sample)

CC Amount

Other

Amount

5151|

Authorize Duration

0 hours

☒ Add Address from Contact

Address Line1

City

State/Province

Country

Zip

Authorize

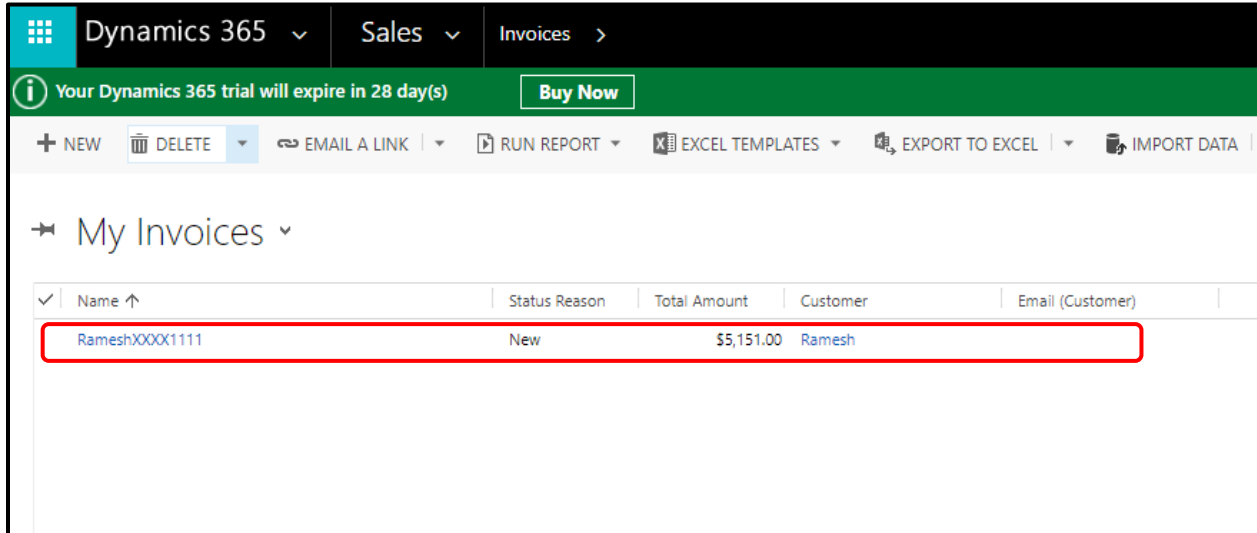
This transaction has been approved

- Enter the amount according to your requirement.
- 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)

Step12:

- Navigate to Dynamics365 → Sales → Invoices.
- You will be able to see the invoice of the payment which you did.

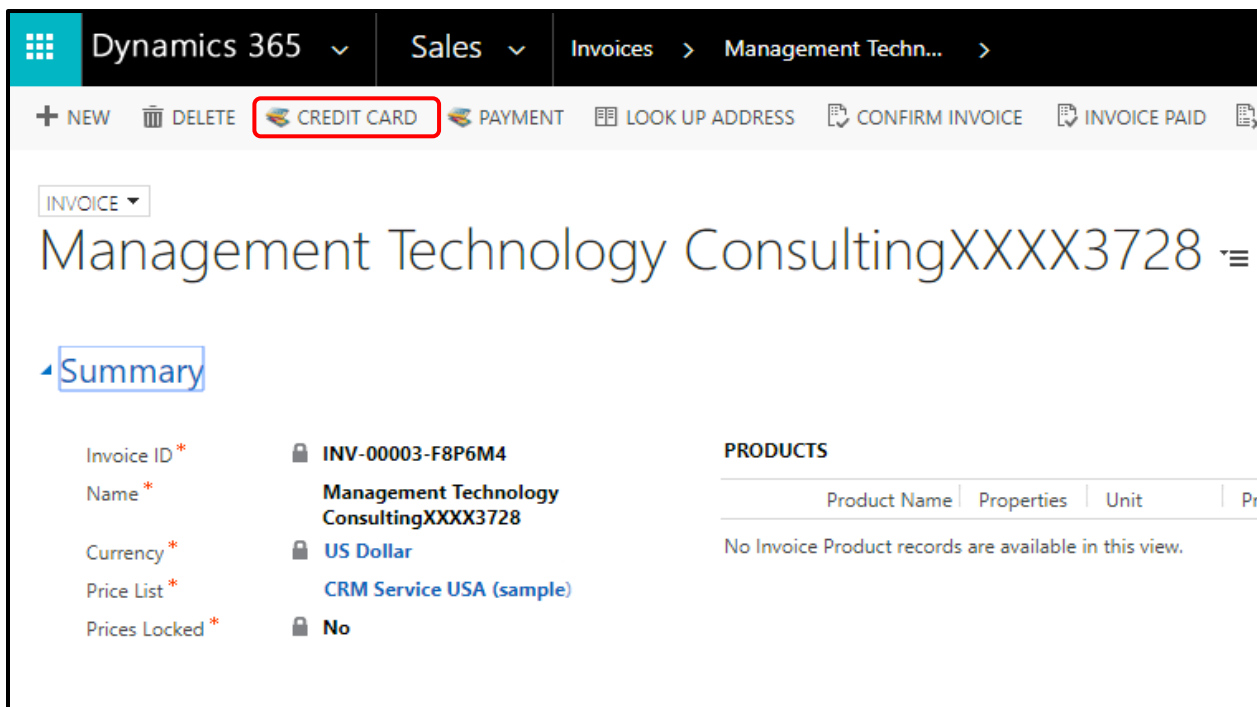


The screenshot shows the Dynamics 365 interface. The top navigation bar includes 'Dynamics 365', 'Sales', and 'Invoices'. A green banner at the top indicates 'Your Dynamics 365 trial will expire in 28 day(s)' with a 'Buy Now' button. Below the banner is a toolbar with options: '+ NEW', 'DELETE', 'EMAIL A LINK', 'RUN REPORT', 'EXCEL TEMPLATES', 'EXPORT TO EXCEL', and 'IMPORT DATA'. The main section is titled 'My Invoices'. A table lists invoices with columns: Name, Status Reason, Total Amount, Customer, and Email (Customer). One invoice is highlighted with a red box: Name 'RameshXXXX1111', Status Reason 'New', Total Amount '\$5,151.00', Customer 'Ramesh'.

Name	Status Reason	Total Amount	Customer	Email (Customer)
RameshXXXX1111	New	\$5,151.00	Ramesh	

Credit Card Processing from Invoice

- Navigate to Dynamics 365 → Sales → Invoice → Select any invoice.
- Click on CREDIT CARD for the further procedure.




The screenshot shows the Dynamics 365 interface for a specific invoice. The top navigation bar includes 'Dynamics 365', 'Sales', 'Invoices', and 'Management Techn...'. The toolbar has options: '+ NEW', 'DELETE', 'CREDIT CARD' (highlighted with a red box), 'PAYMENT', 'LOOK UP ADDRESS', 'CONFIRM INVOICE', and 'INVOICE PAID'. The main section is titled 'Management Technology ConsultingXXXX3728'. Below the title is a 'Summary' section with the following details:

- Invoice ID*: INV-00003-F8P6M4
- Name*: Management Technology ConsultingXXXX3728
- Currency*: US Dollar
- Price List*: CRM Service USA (sample)
- Prices Locked*: No





There is also a 'PRODUCTS' section with a table header: Product Name, Properties, Unit, and Price. Below the header, it states: 'No Invoice Product records are available in this view.'

- Select the existing credit card from the drop down list.
- Select Transaction Status as **Authorized**.
- 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.


Dynamics 365

Sales

Invoices > **New Credit Card Tra...**

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

CREDIT CARD TRANSACTION : INFORMATION

New Credit Card Transaction

General

Regarding Contact **Abraham McCormick**

Currency **US Dollar**

Price List* **CRM Service USA (sample)**


Transaction Information


Credit Card* **XXXX3728**


Order --


Opportunity --

Transaction Results

Transaction Date  --

Authorization ID  --

Transaction ID  --

Transaction Result  --

Transaction Status* **Authorized**

Capture --

Note: Currency and Price list should be as same as invoice.

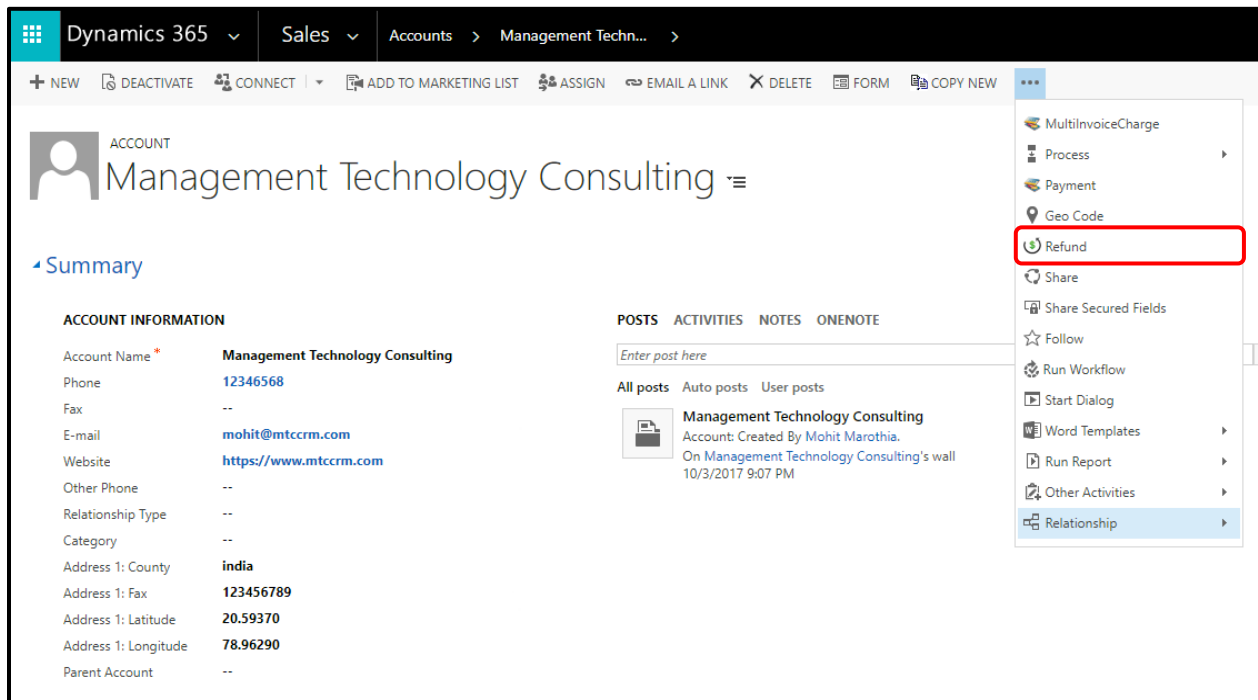
- Transaction Date, Authorization ID, Transaction Id and Transaction Result are displayed.

Transaction Results	
Transaction Date	🔒 10/17/2017
Authorization ID	🔒 408LXS
Transaction ID	🔒 60032062908
Transaction Result	🔒 This transaction has been approved.
Transaction Status *	Authorized
Capture	--

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.

- Navigate to **Dynamics 365** → **Sales** → either **Accounts** or **Contacts**.
- For example let's see how **Refund system** works on Accounts.



Dynamics 365 | Sales | Accounts > Management Techn...

NEW | DEACTIVATE | CONNECT | ADD TO MARKETING LIST | ASSIGN | EMAIL A LINK | DELETE | FORM | COPY NEW

ACCOUNT
 Management Technology Consulting

Summary

ACCOUNT INFORMATION

Account Name *	Management Technology Consulting
Phone	12346568
Fax	--
E-mail	mohit@mtccrm.com
Website	https://www.mtccrm.com
Other Phone	--
Relationship Type	--
Category	--
Address 1: County	india
Address 1: Fax	123456789
Address 1: Latitude	20.59370
Address 1: Longitude	78.96290
Parent Account	--

POSTS | ACTIVITIES | NOTES | ONENOTE

Enter post here

All posts | Auto posts | User posts

Management Technology Consulting
 Account: Created By Mohit Marothia.
 On Management Technology Consulting's wall
 10/3/2017 9:07 PM

MultiInvoiceCharge
 Process
 Payment
 Geo Code
Refund
 Share
 Share Secured Fields
 Follow
 Run Workflow
 Start Dialog
 Word Templates
 Run Report
 Other Activities
 Relationship

- Now Click on **Refund**, a new window appears.
- Credit Card Number is selected by a drop down list.
- All the Credit card No's only pertaining to this Account (Management Technology Consulting) are displayed.
- From the list select the card you choose to refund the payment for.
- On Selecting the Card No, all the Settled Transactions related to the card are displayed for your ready reference.
- User can Enter **Description** in the box provided for reference.
- Details Such as Transaction ID, Invoice, Payment Amount, Settled On and Remarks.
- Finally Click on REFUND button.

Refund Form
 ×

Credit card Number: XXXX3728 ▼

Customer Name: Management Technology Consult

Description: Insufficient of Fund.

	Transaction Id	Invoice	Payment Amount	Settled On	Result
<input checked="" type="checkbox"/>	60032062597		30000.0000	17/10/2017	

Refund

- On Successful Refund process, In Remarks it is updated as “Succeeded” as shown below.
- User can also check for the Corrections by using Advance Find option also.

Refund Form
 ×

Credit card Number: XXXX3728 ▼

Customer Name: Management Technology Consult

Description: Insufficient of Fund.

	Transaction Id	Invoice	Payment Amount	Settled On	Result
<input checked="" type="checkbox"/>	60032062597		30000.0000	17/10/2017	succeeded

Refund

- If the refund succeeded the Credit card Transaction will sent to Refunded state, Refund record goes to Inactive as shown below.

Dynamics 365 | **Recruitment** | **Accounts** > **Management Techn...**

NEW | DEACTIVATE | DELETE | ASSIGN | SHARE | SHARE SECURED FIELDS | EMAIL A LINK | RUN WORKFLOW | START DIALOG

CREDIT CARD TRANSACTION : INFORMATION

Management Technology ConsultingXXXX3728

General

Regarding Contact	--	Regarding Account	Management Technology Consulting
Currency	US Dollar	Owner	Mohit Marothia
Price List	CRM Service USA (sample)		

Transaction Information

Credit Card	XXXX3728	Amount	\$30,000.00
Order	--	Invoice	Management Technology ConsultingXXXX3728
Opportunity	--	Quote	--

Transaction Results

Transaction Date	10/16/2017
Authorization ID	6NDHJE
Transaction ID	60032031135
Transaction Result	This transaction has been approved.

Status: **Inactive** | Status Reason: **Refunded**

Inactive | Read only

REFUND : INFORMATION

60032139499

General

Name	60032139499	ACTIVITIES NOTES
Account	Management Technology Consulting	
Contact	--	Enter a note
Reference Transaction	60032062597	No Notes found.
Credit Card	XXXX3728	
Transaction	Management Technology ConsultingXXXX3728	
Refund Amount	₹30,000.00	
Invoice Number	--	
Description	--	
Owner	Mohit Marothia	

Inactive | Read only

Notes:

- 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.
- The Transaction ID will be generated after 24 hours.

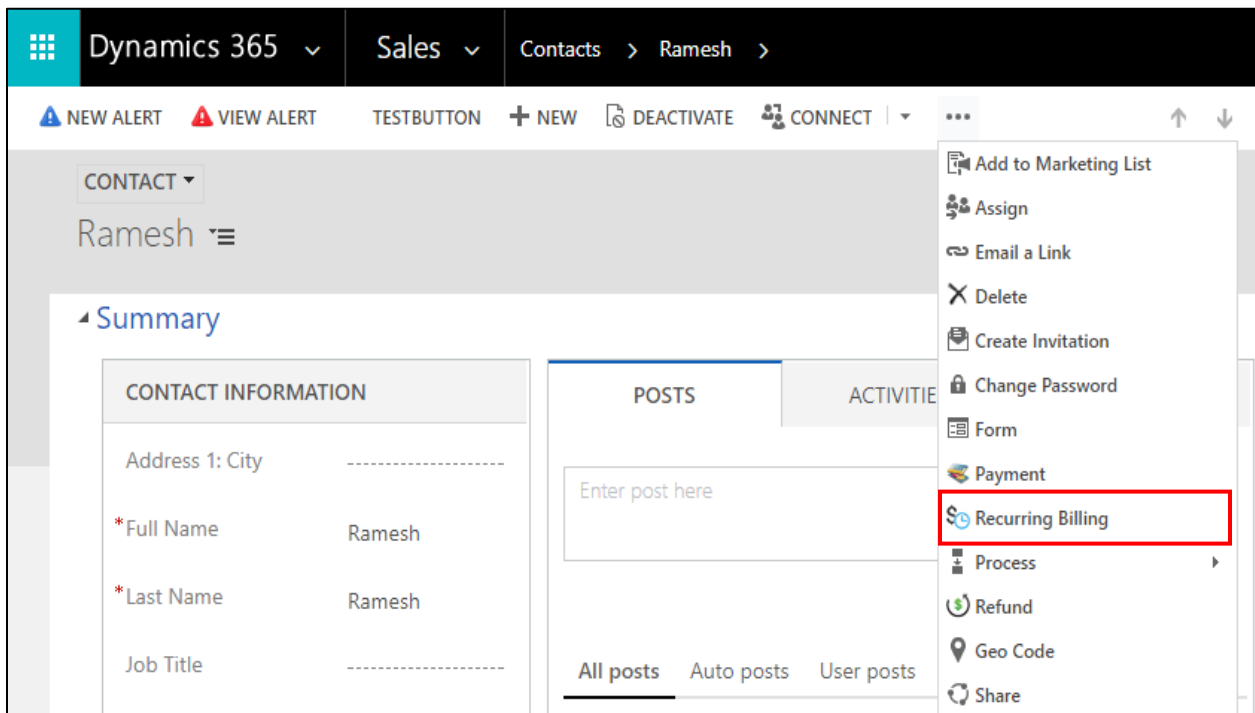
Procedure to Recurring Billing for Customers

Recurring Billing is a new significant feature implemented by MTC. Recurring Billing helps in doing automatic payments to the clients as per the occurrence period.


Payments will be done according to the frequencies defined. It will help in saving time in doing such repeated payments every month or week.

With the help of recurring billing you can add all the information of the payments like when the payment has to be done, how much to be done and till when it has to be done.

- Navigate to **Dynamics 365** → **Sales** → either **Accounts** or **Contacts**
- For example let's see how **Recurring Billing** works on **Contacts**
- Now Click on **Recurring Billing**, a new window appears



The screenshot shows the Dynamics 365 interface. The top navigation bar includes 'Dynamics 365', 'Sales', and 'Contacts > Ramesh >'. Below the navigation bar, there are buttons for 'NEW ALERT', 'VIEW ALERT', 'TESTBUTTON', '+ NEW', 'DEACTIVATE', and 'CONNECT'. The main content area displays the 'CONTACT' record for 'Ramesh'. On the right side, a context menu is open, listing various actions: 'Add to Marketing List', 'Assign', 'Email a Link', 'Delete', 'Create Invitation', 'Change Password', 'Form', 'Payment', 'Recurring Billing' (highlighted with a red box), 'Process', 'Refund', 'Geo Code', and 'Share'. The 'Recurring Billing' option is the one to be selected according to the procedure.

RECURRING BILLING	
Subscription Interval	
Subscription Name *	MTC
Subscription Type *	Every Month ▼
Subscription Interval *	3
Subscription Duration	
Subscription Start Date	2018/01/23 
Payment Amount *	1000
Total Occurrences *	5
Trail Period	
Trail Amount	0
Trail Occurrences	
Customer Information	
Customer *	Ramesh
Email *	null
Credit Card *	Select ▼
Address Line1	null
Address Line2	null
Address Line3	null
City *	null
State/Province	null
Zip/Postal Code *	null
Country *	null

- Subscription name: Name for the Recurring Billing.
- Subscription Type: Duration of the Occurrence in (Day/Month)
- Subscription Interval: Describes no. of intervals(Ex: 3, 4, etc.)
- Subscription Start Date: Describes the date on which Recurring Billing has to start.
- Payment Amount: Amount to be paid in each particular intervals.
- Total Occurrences: Describes no. of intervals within which the payment has to be done.

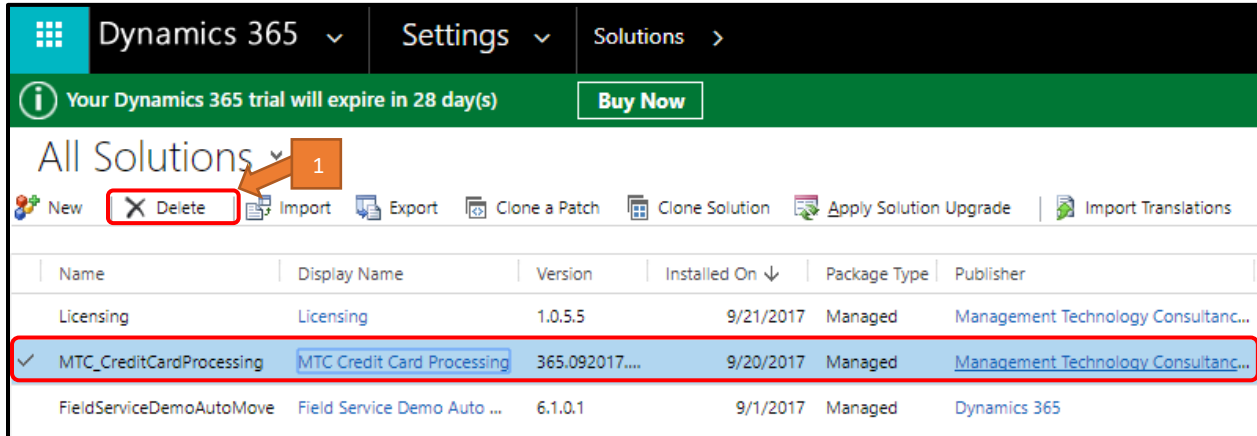
Trail Period: Users can provide the amount & Occurrence for a trail version.

Customer Information: Provide all the necessary information related to the customer.

How to Uninstall Credit Card Processing in your Dynamics 365?

Step1:

- Navigate to **Dynamics 365** -> **Settings** and click on **Solutions**.
- Select the **MTC_CreditCardProcessing** solution and click on **Delete**.

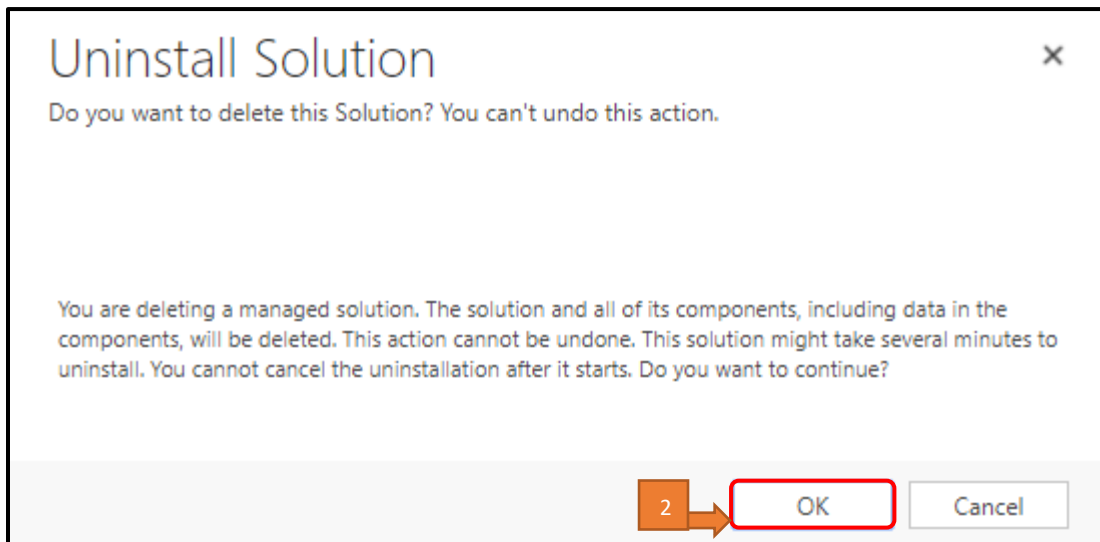


The screenshot shows the Dynamics 365 interface. At the top, there's a navigation bar with 'Dynamics 365', 'Settings', and 'Solutions'. Below this is a green banner indicating the trial will expire in 28 days. The main area is titled 'All Solutions' and contains a table of installed solutions. A red box highlights the 'Delete' button in the top toolbar, with an orange arrow pointing to it labeled '1'. Another red box highlights the 'MTC_CreditCardProcessing' solution row in the table, which is selected. The table has columns for Name, Display Name, Version, Installed On, Package Type, and Publisher.

Name	Display Name	Version	Installed On	Package Type	Publisher
Licensing	Licensing	1.0.5.5	9/21/2017	Managed	Management Technology Consultanc...
✓ MTC_CreditCardProcessing	MTC Credit Card Processing	365.092017....	9/20/2017	Managed	Management Technology Consultanc...
FieldServiceDemoAutoMove	Field Service Demo Auto ...	6.1.0.1	9/1/2017	Managed	Dynamics 365

Step2:

- Click on **OK** to start uninstallation process of **MTC_CreditCardProcessing**.



The screenshot shows the 'Uninstall Solution' dialog box. It has a title bar with a close button. The main text asks: 'Do you want to delete this Solution? You can't undo this action.' Below this, a warning message states: 'You are deleting a managed solution. The solution and all of its components, including data in the components, will be deleted. This action cannot be undone. This solution might take several minutes to uninstall. You cannot cancel the uninstallation after it starts. Do you want to continue?' At the bottom, there are two buttons: 'OK' and 'Cancel'. An orange arrow labeled '2' points to the 'OK' button, which is also highlighted with a red box.