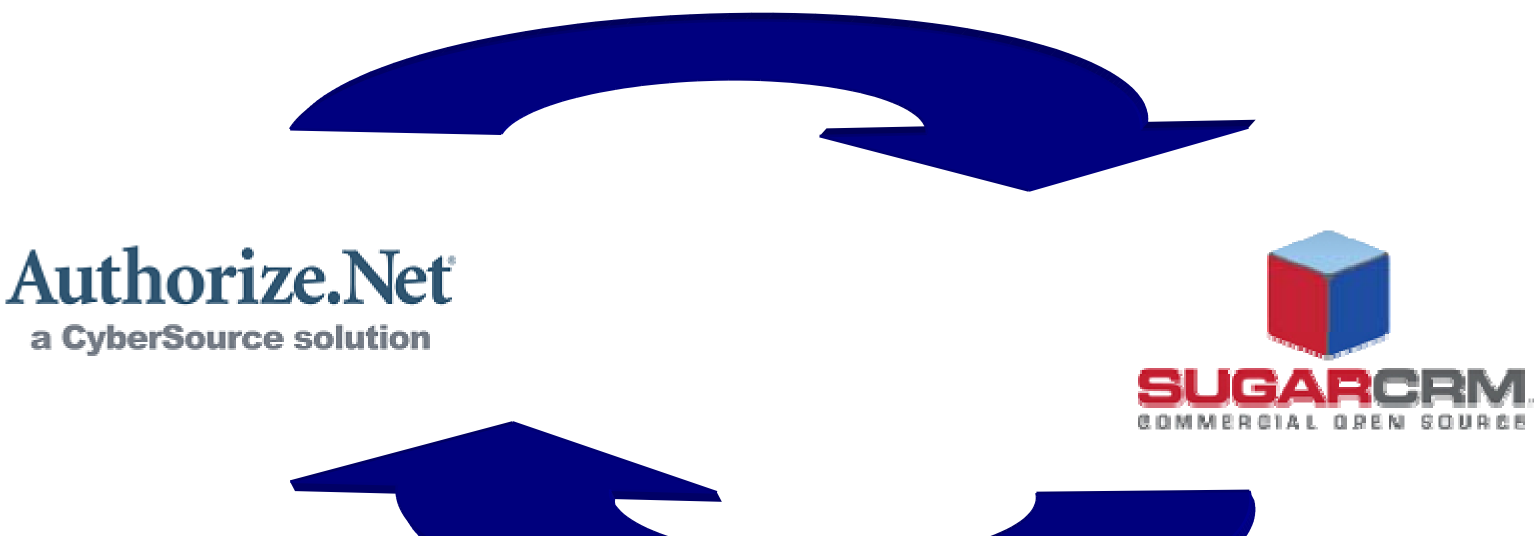
Faye Business Systems Group

SugarCRM – Authorize.Net Integration

Spec Sheet



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Compatibilities

This software is currently compatible with:

Authorize.Net Payment Gateway
SugarCRM v6.0
SugarCRM v6.1
SugarCRM v6.2
SugarCRM v6.3
SugarCRM v6.4

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Overview

SugarCRM is the leading open source CRM software package in the world. Authorize.Net enables merchants to authorize, settle and manage credit card and electronic check transactions via Web sites, retail stores, mail order/telephone order (MOTO) call centers and mobile devices.

The FBSG **Sugar CRM – Authorize.Net Integration Application** allows you to securely enter credit card billing information on Authorize.Net from within Sugar CRM. Authorized users are able to charge and authorize credit cards for specific amounts. When using this enhancement, your client profiles and billing information will be organized and safely stored for easy access.

Key Benefits

- Safe and simple credit card transactions that are in compliance with all credit card laws.
- Protection of all your client profiles and billing information.
- Create quick and easy profiles with credit card data for all your customer quotes.
- Avoid re-entering billing information for returning clients.
- Fast and secure client billing and reprocessing of payments
- Easy updating of all customer billing information.

Introduction

The FBSG SugarCRM – Authorize.Net Integration Application has the following capabilities:

1. Allows you to add and edit multiple credit cards per account or contact. All credit card data is stored online in Authorize.Net's secure database. No credit card data is stored in Sugar.

2. Allows you to authorize a credit card on an account, contact, or for a specific quote.

3. Allows you to charge a credit card on an account, contact, or for a specific quote.

4. Provides a sub-module under Accounts and Contacts containing all Authorize.Net credit card transaction history associated with the related Account or Contact.

Once the Sugar-Authorize.Net Settings have been configured under the Administration portion of Sugar, the new functionality is ready to use.

Installation

This application synchronizes data between SugarCRM and Authorize.Net. The installation requires two steps:

A. Installation of the SugarCRM – Authorize.Net Integration module within SugarCRM
B. Configuration of module

You will need the following file from FBSG to complete the installation:

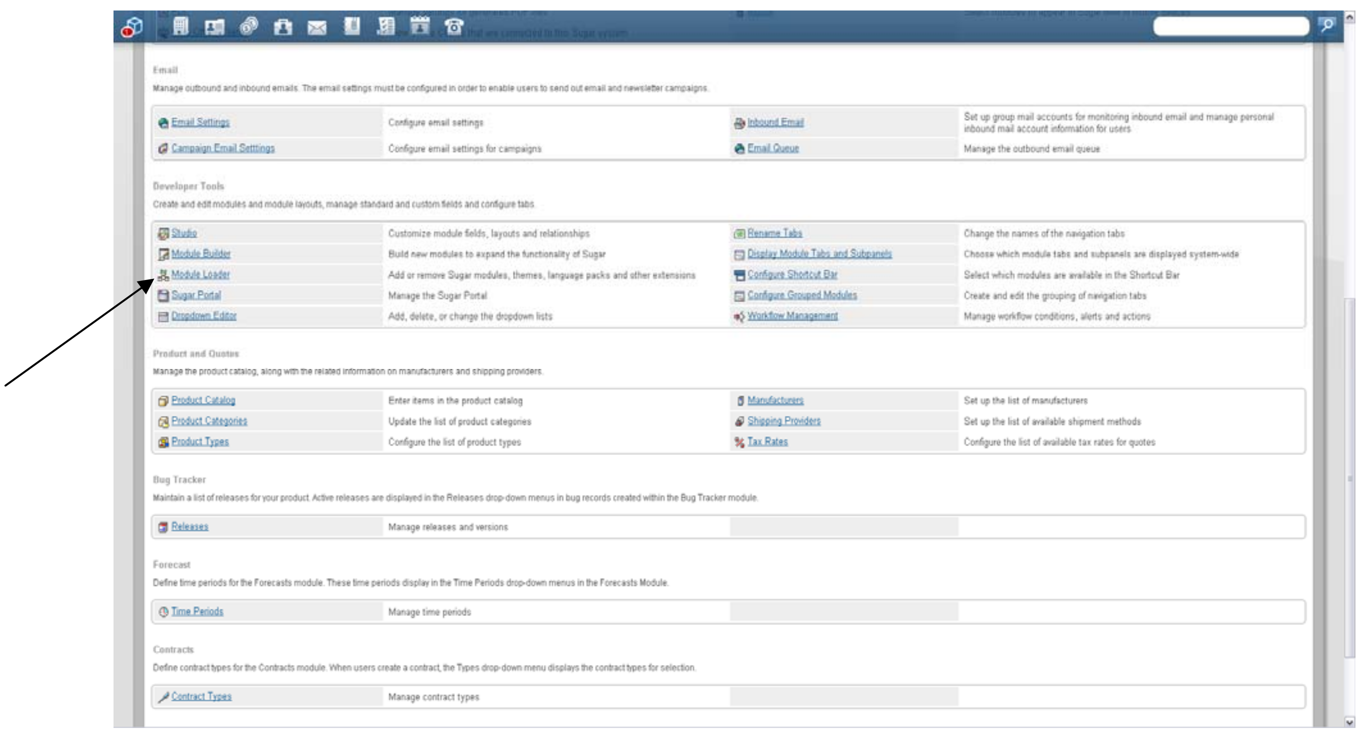
FBSG_SugarCRM_AuthorizeNetIntegration.zip

Procedures – Installation

1. Log in to your SugarCRM instance using an account with Administrative privileges.

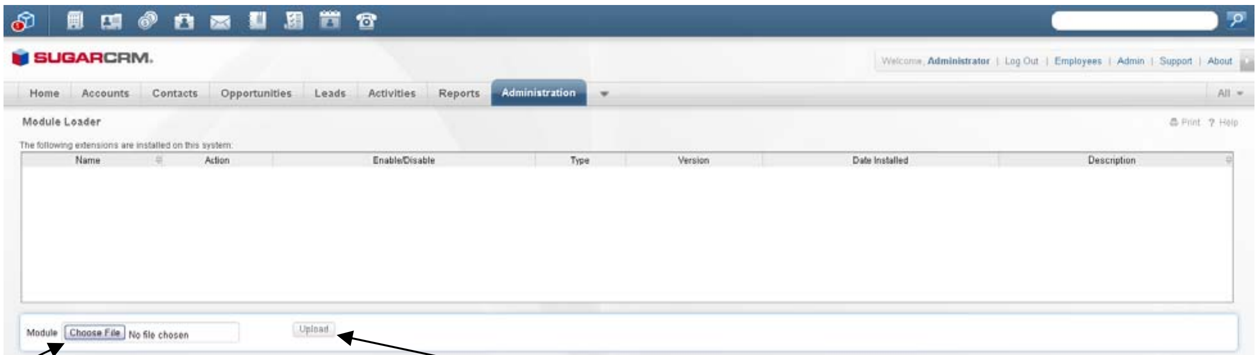
2. Go to the Administration page within Sugar (Click 'Admin' in the upper right corner).

3. Click 'Module Loader.'

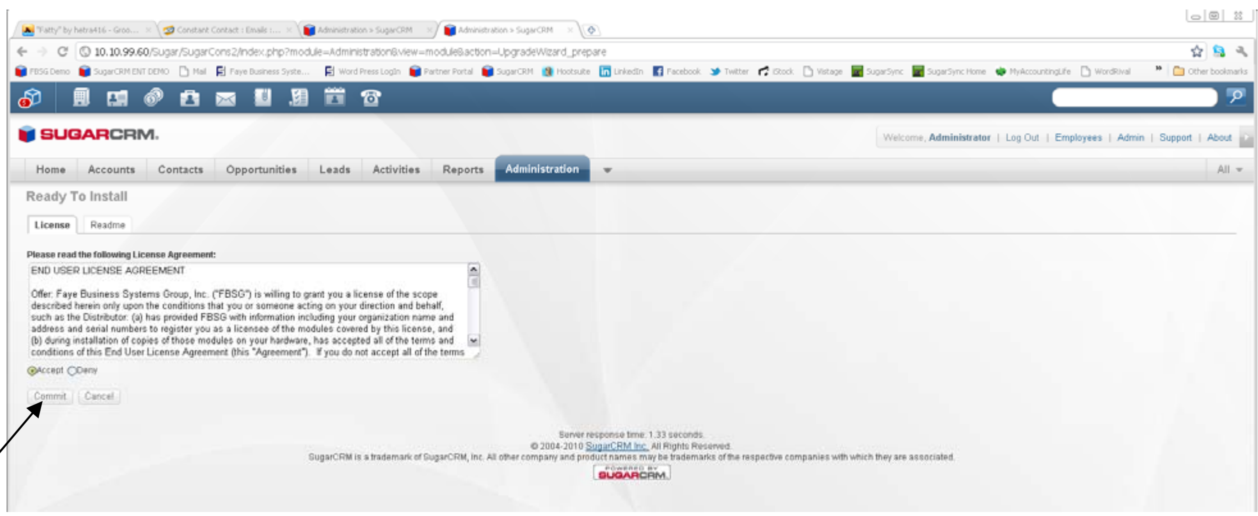


Procedures – Installation (Continued)

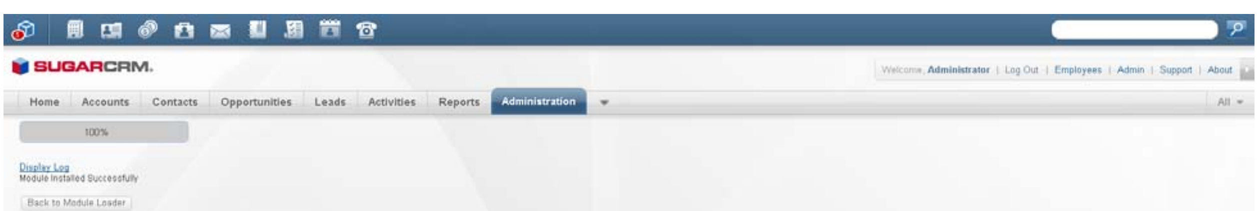
4. Click ‘Choose File,’ find *FBSG_SugarCRM_AuthorizeNetIntegration.zip*, press ‘Open’, then press ‘Upload.’



5. Click ‘Install,’ accept the license agreement, and click ‘Commit.’

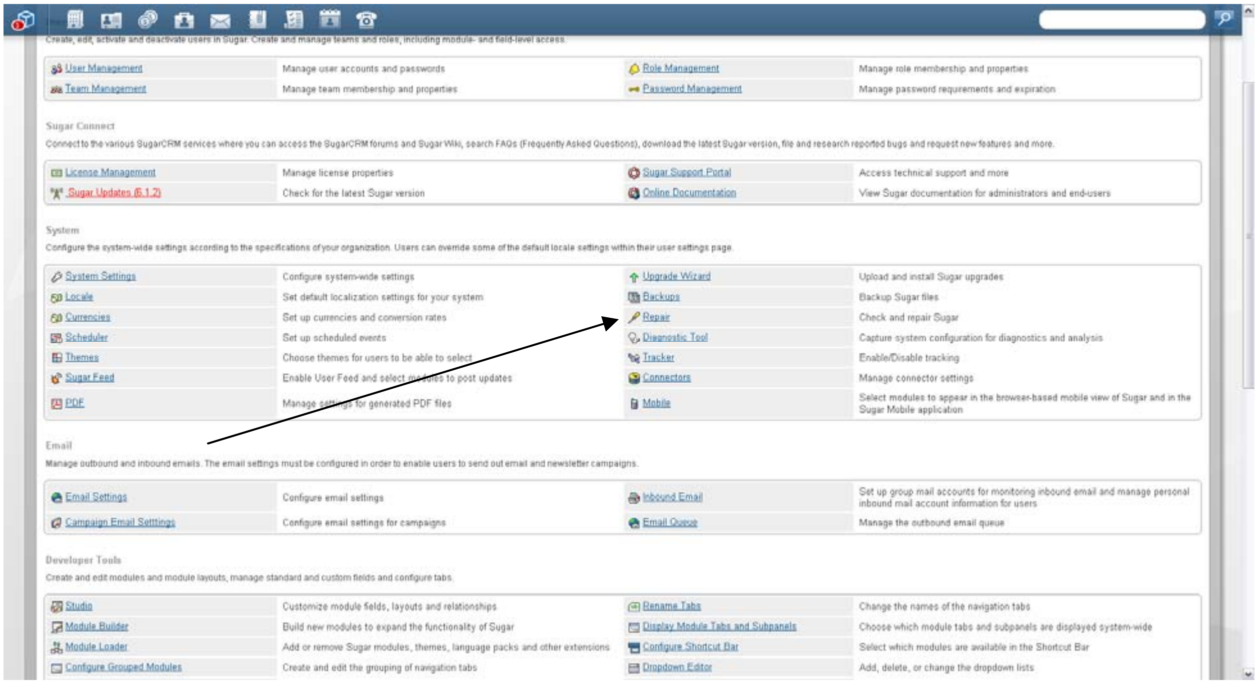


6. The module will install.

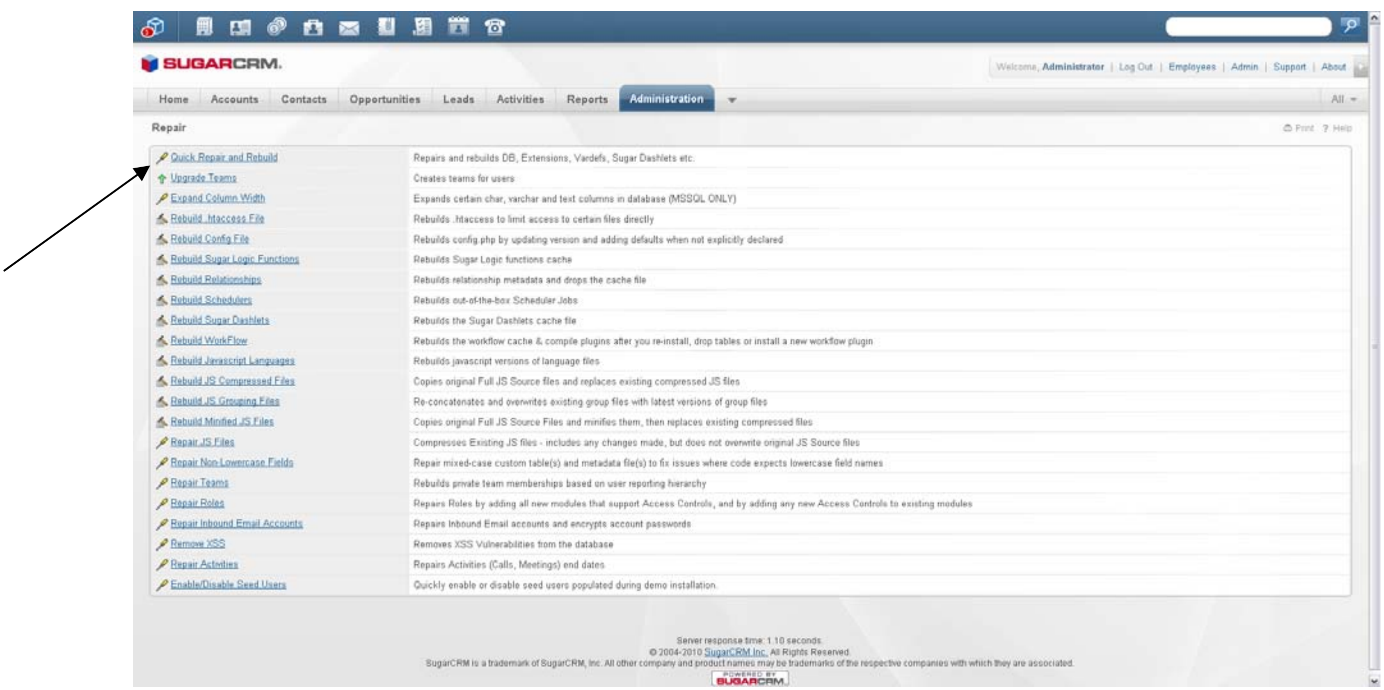


Procedures – Installation (Continued)

7. Click the 'Administration' tab, then click 'Repair.'

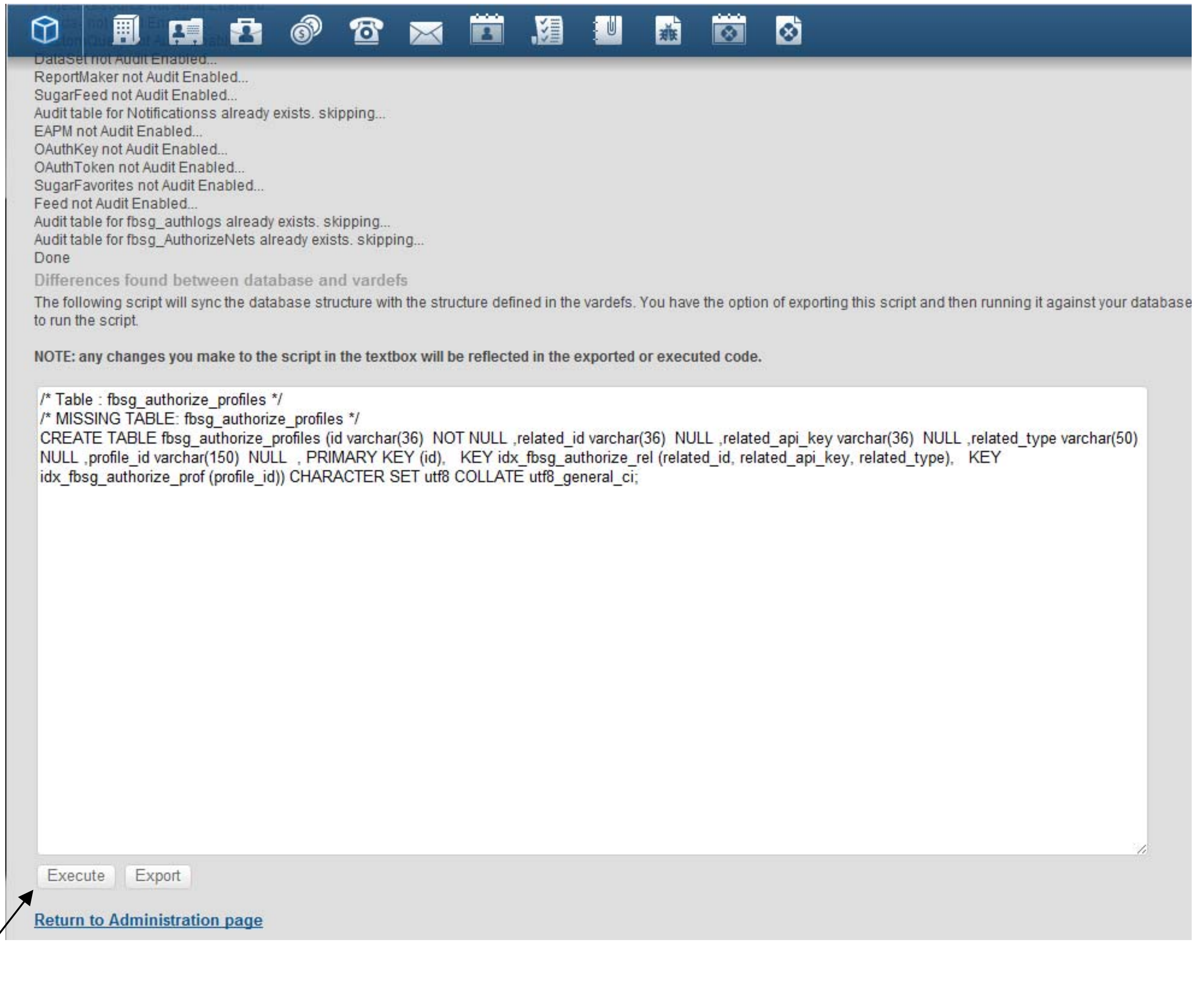


8. Click 'Quick Repair and Rebuild'.



Procedures – Installation (Continued)

9. Scroll to the bottom of the page, and click ‘Execute.’

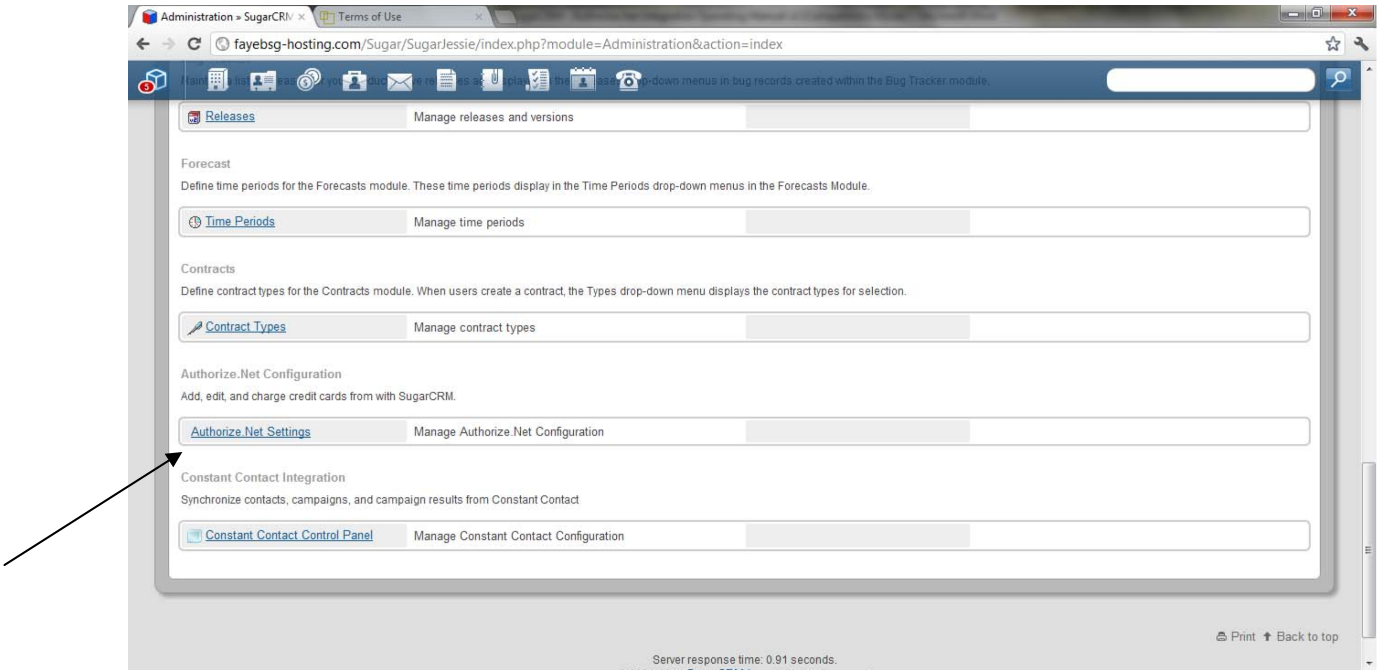


Configuration

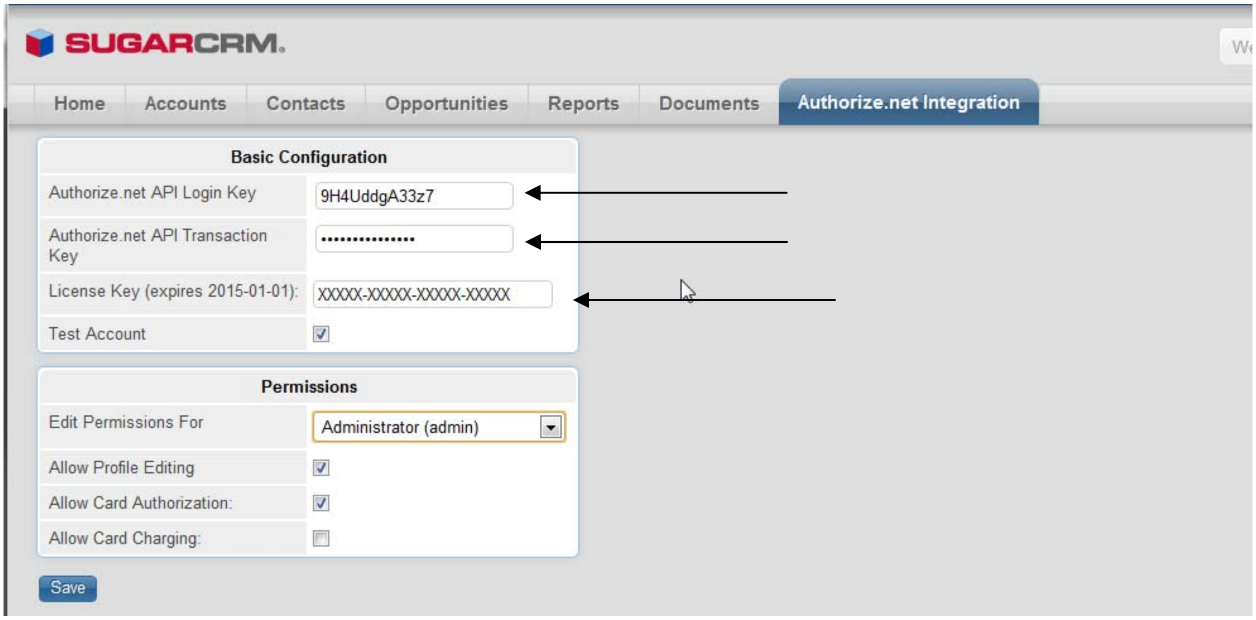
Procedures – Configuration

Note: You may have to log out and log back in after you “execute” in order for the “Authorize.Net Settings” to appear in the admin screen (see below screen shot).

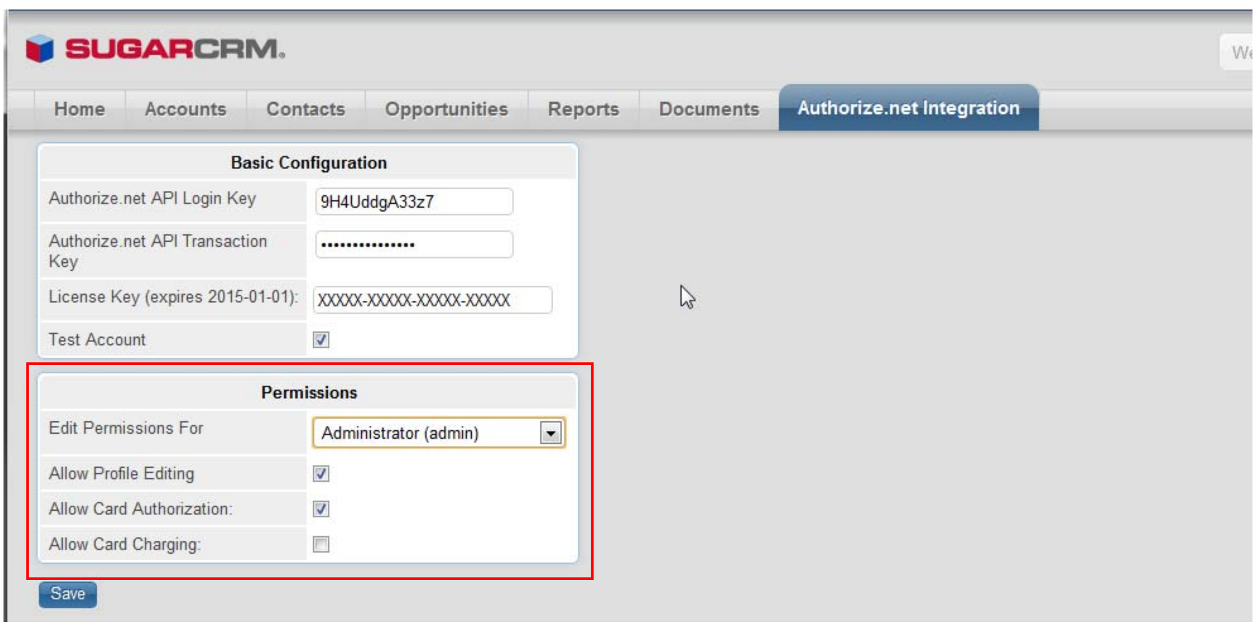
1. Go to the ‘Admin’ screen, scroll to the bottom, and click ‘Authorize.Net Settings”.



2. Enter your Authorize.Net login key and transaction key.   Check the “Test Account” checkbox if the entered Authorize.Net information is a for an Authorize.Net test account. The License Key is supplied by FBSG.



3. By default, no users are able to edit billing profiles, or charge or authorize cards. Use the Permissions section to set the permissions for each user.

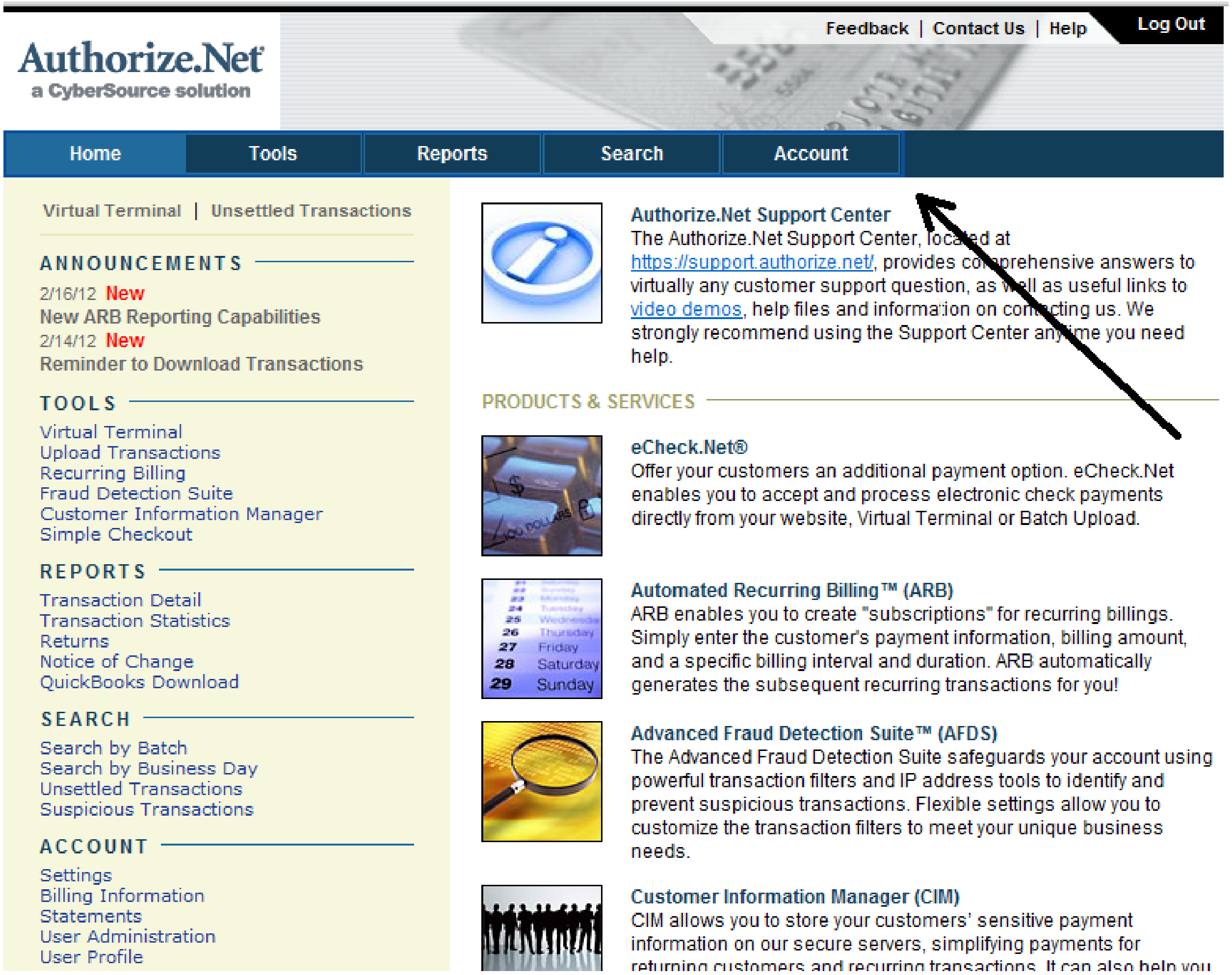


4. Authorize.Net billing profiles in Sugar are linked through the Authorize.Net API Login Key. If the API Login Key is changed, those billing profiles will no longer be available for charging or authorizing. If the API Login Key is changed back to its original value, those profiles will once again be available.

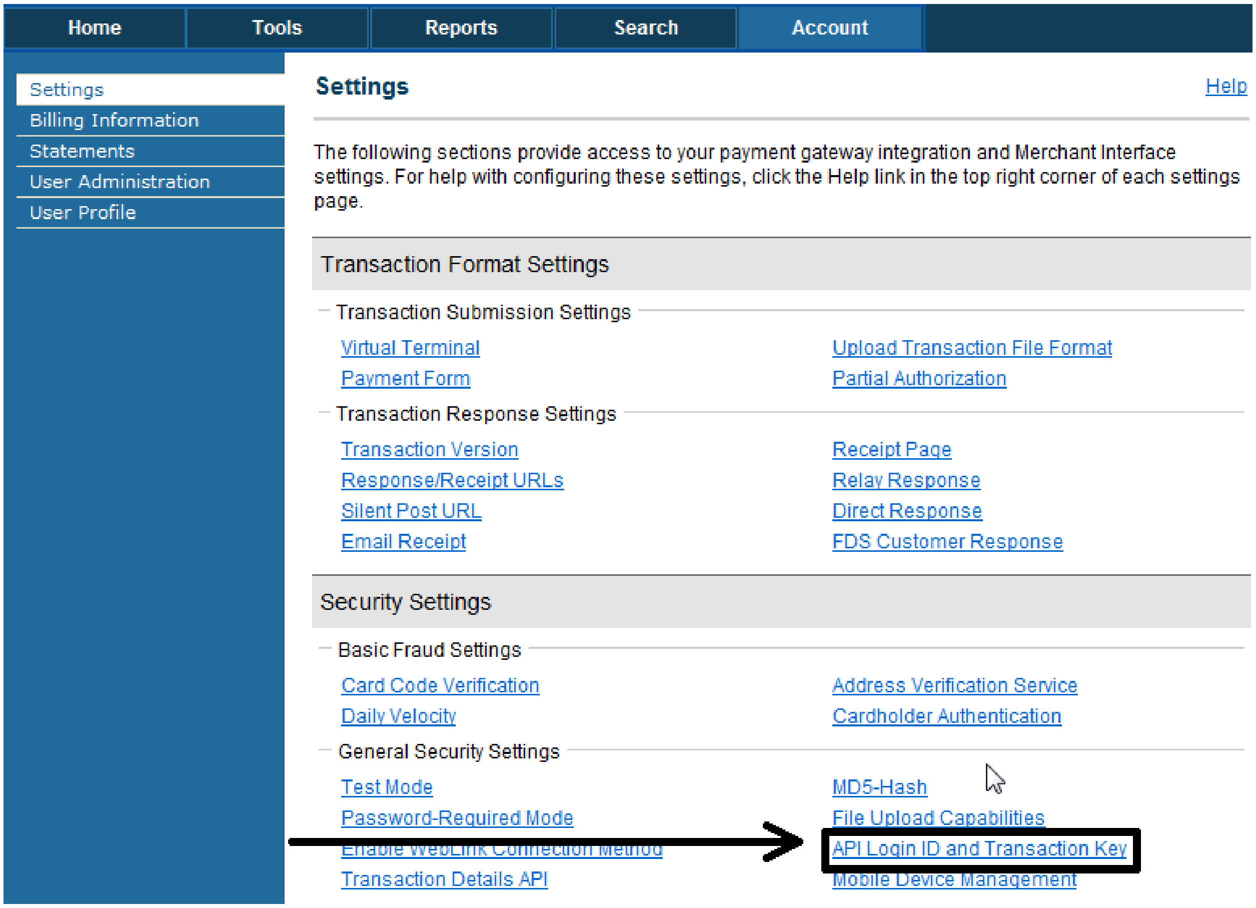
Procedures – Retrieving your API Login ID and Transaction Key

1. First, log in to your Authorize.Net account.

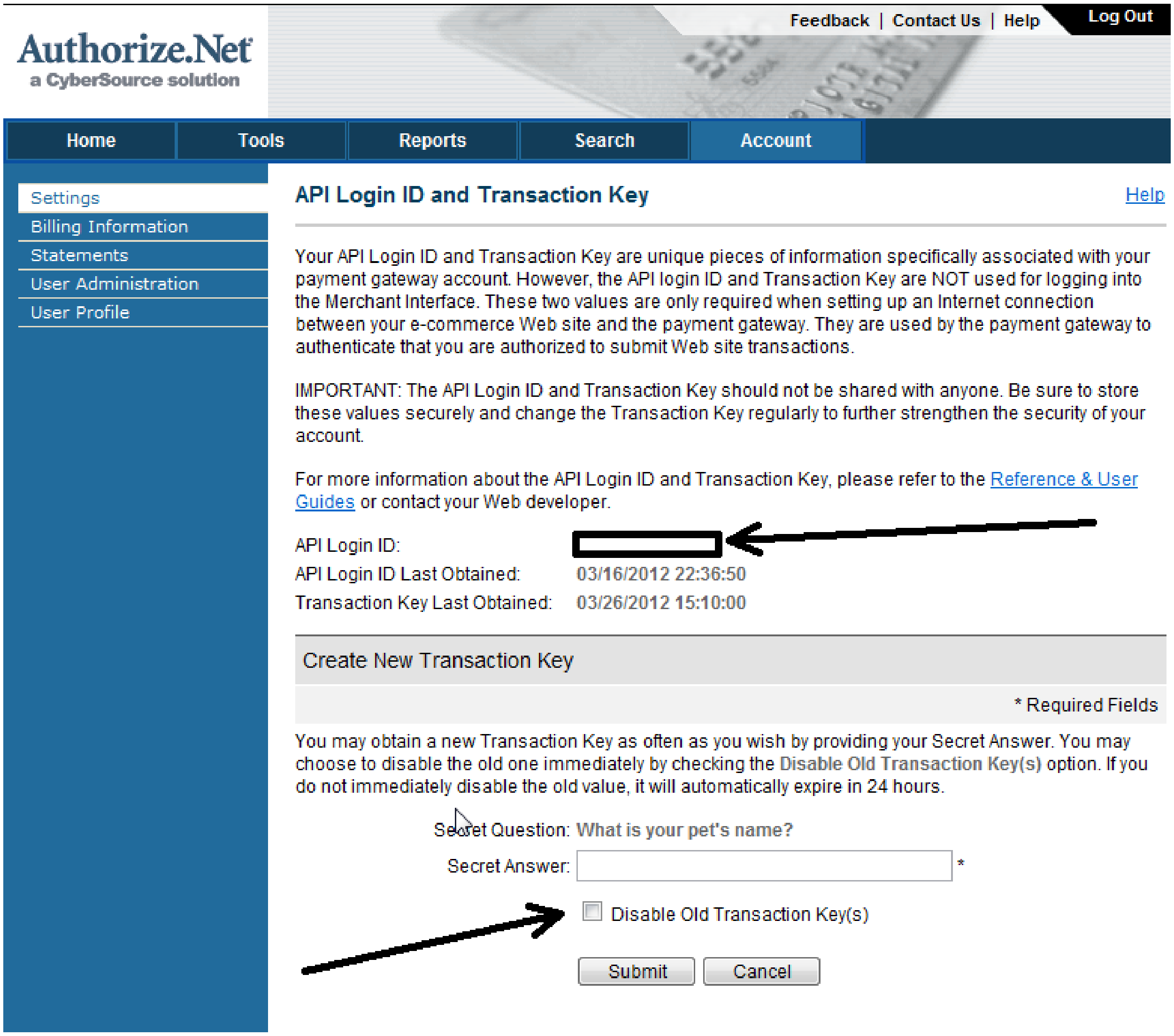
2. Click 'Account'



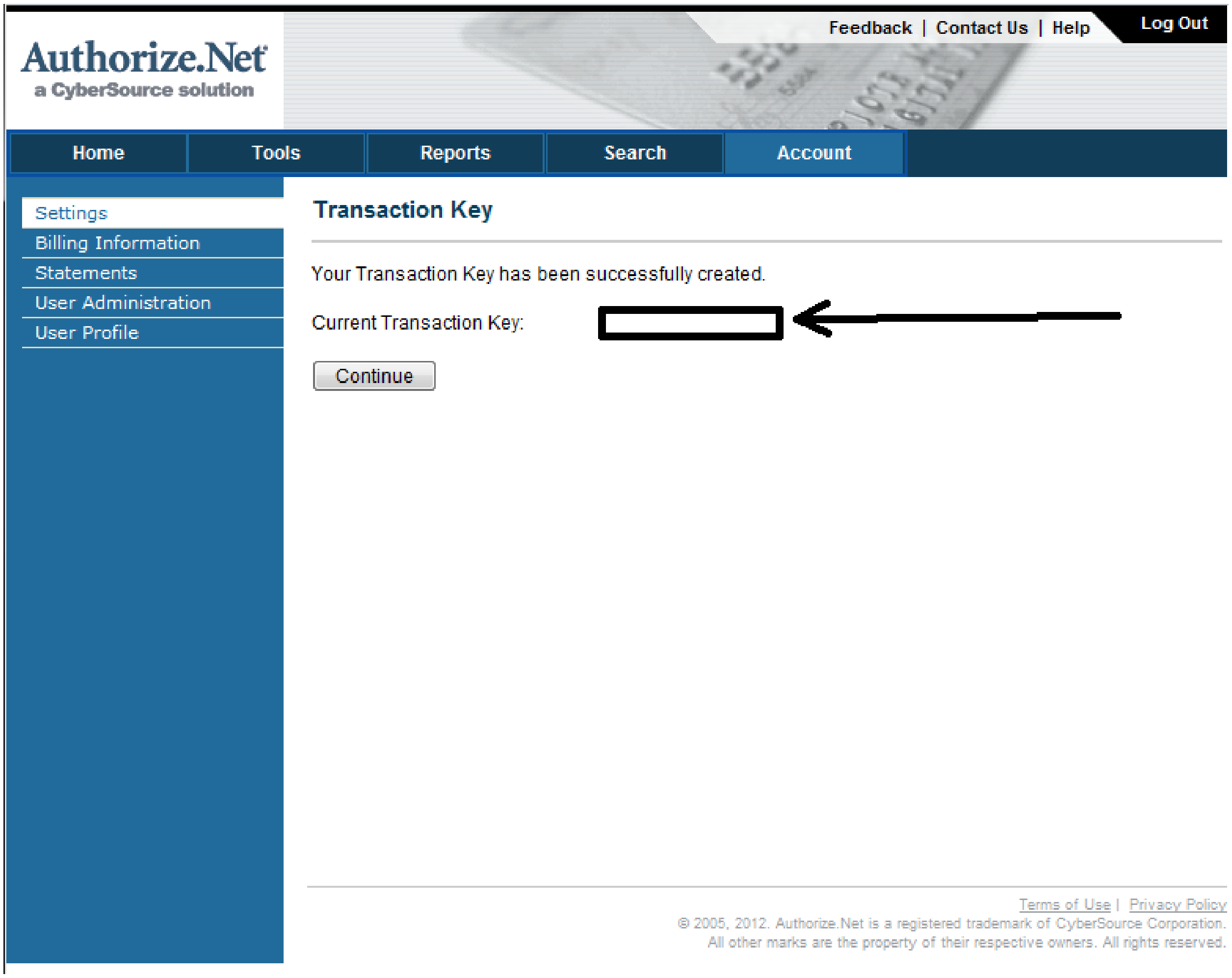
3. Click ‘API Login ID and Transaction Key’



4. Your API Login ID will be available directly on the page. To get a valid transaction key, answer the secret question, and make sure that 'Disable Old Transaction Key(s)' is *not* checked. This will keep any previously created Transaction Keys valid.



5. Your new Transaction Key will be available after clicking ‘Submit’.


Authorize.Net
a CyberSource solution
Feedback | Contact Us | Help
Log Out
Home
Tools
Reports
Search
Account
Settings
Billing Information
Statements
User Administration
User Profile
Transaction Key
Your Transaction Key has been successfully created.
Current Transaction Key:
Continue
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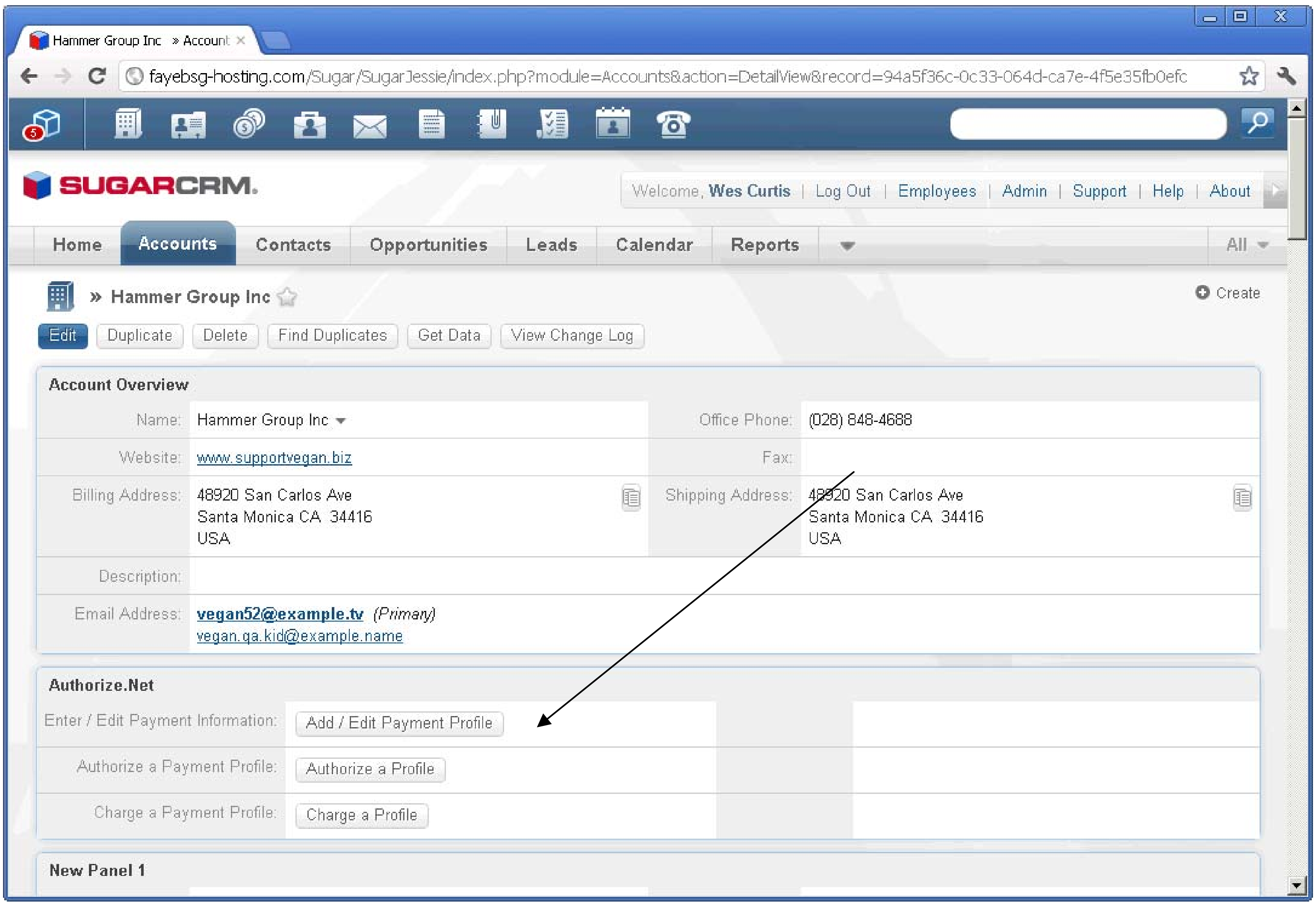
Using the Integration with Accounts or Contacts

Using the Integration with Accounts or Contacts

1. Select an Account or Contact.

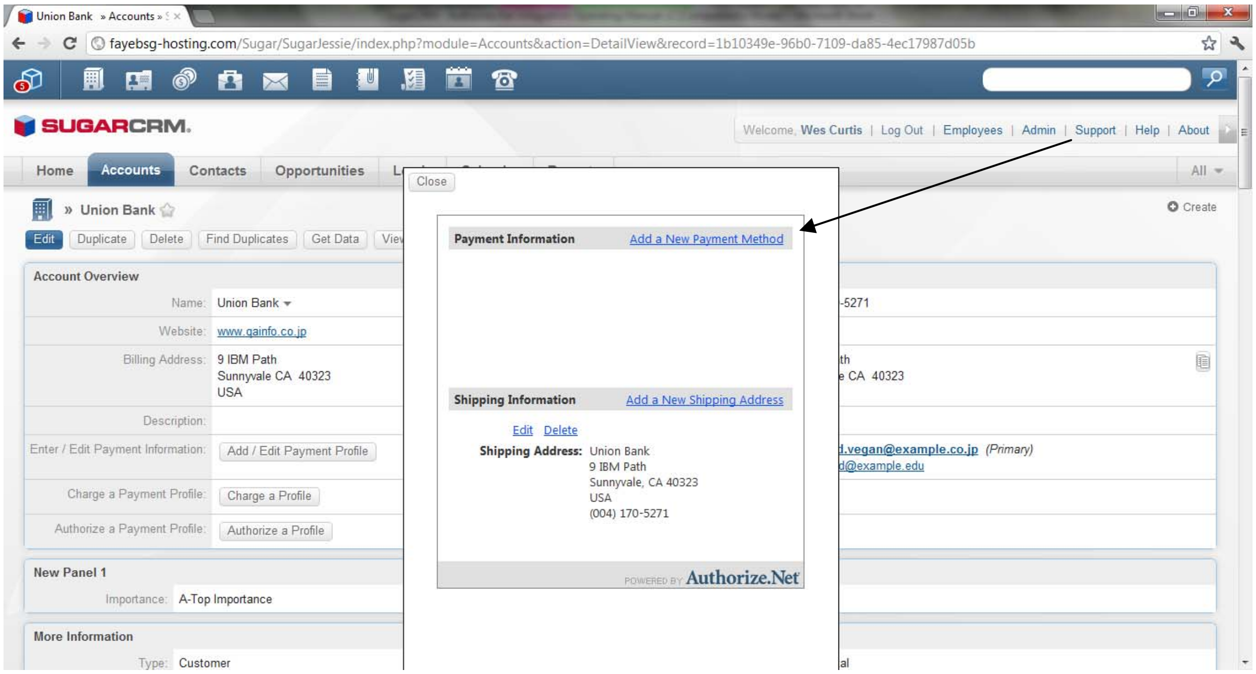
2. Note the options in the new **Authorize.Net** section in the **Overview** section:

    - Add/Edit Payment Profile
    - Authorize a Profile
    - Charge a Profile

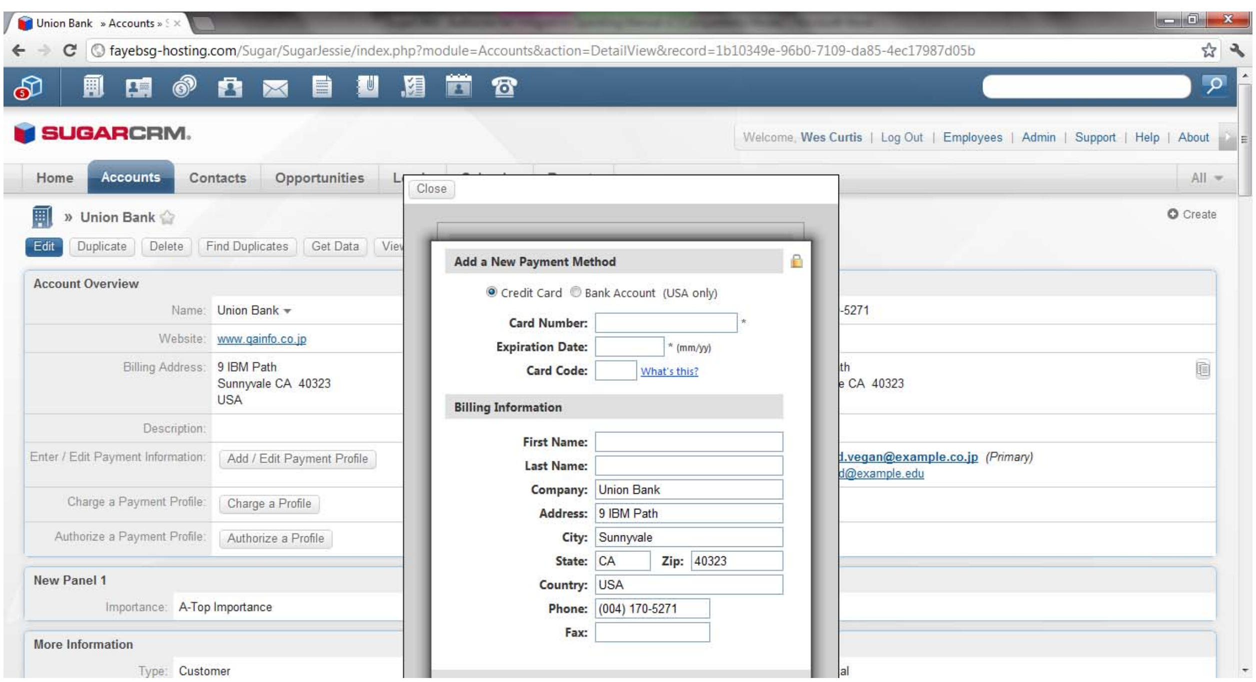


Adding or Editing a Payment Profile

1. Click the **Add/Edit Payment Profile** button.



2. Click **Add a New Payment Method**.

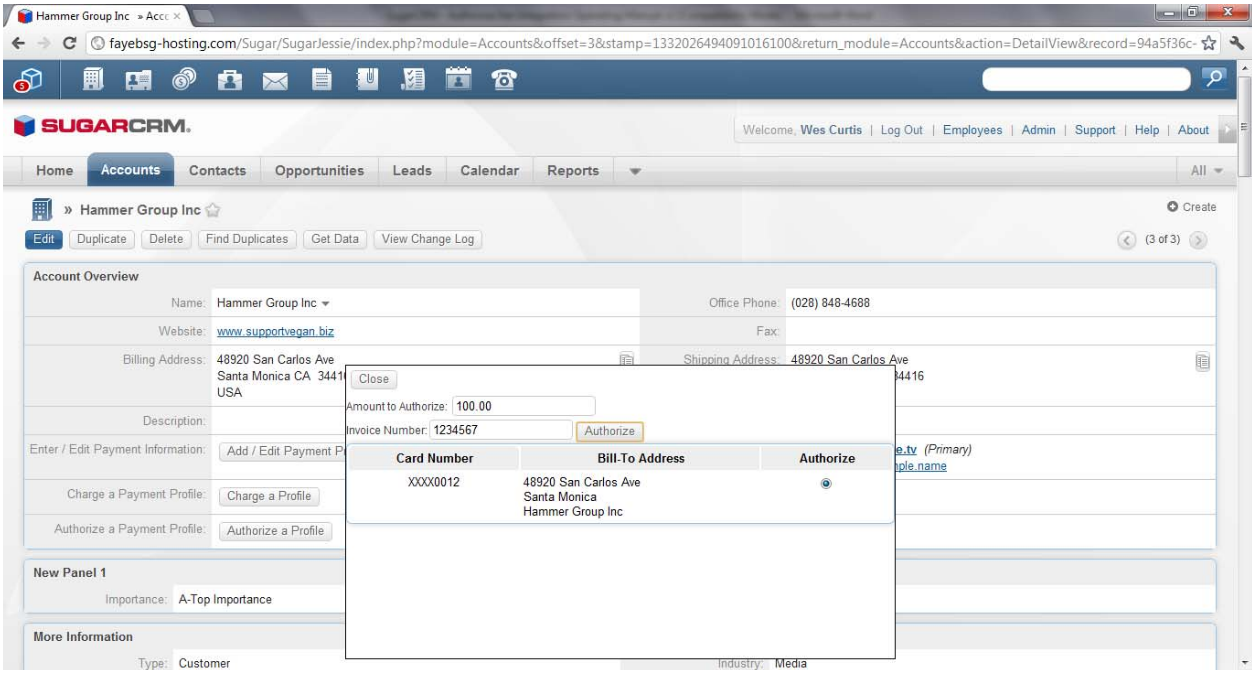


Adding or Editing a Payment Profile (continued)

3. Enter the information as indicated and click **SAVE.**
   - A valid credit card number must be entered on this screen.
   - Multiple credit cards may be saved under each account.

Authorizing a Credit Card

1. Click the **Authorize a Profile** button on the *Accounts or Contacts Screen*.

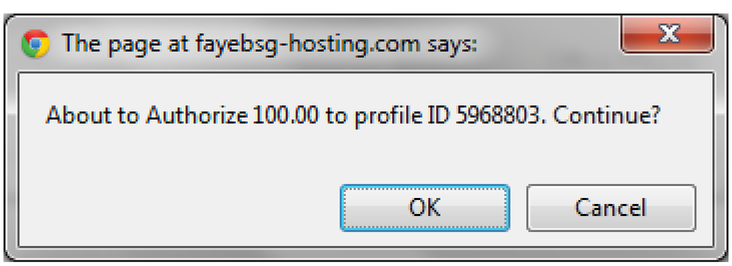


2. All credit cards on file for this account or contact will be listed. Click the **Authorize** radio button for the one you wish to select.

3. Type the dollar amount to authorize.

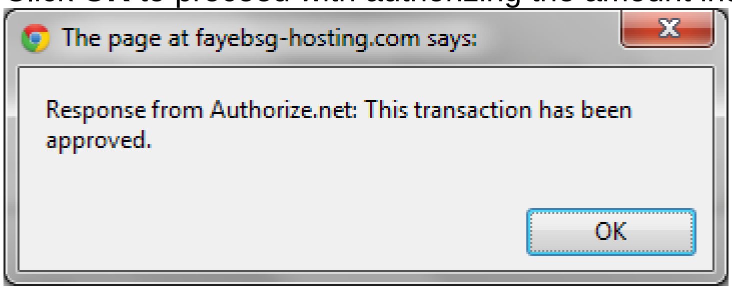
4. Type a related invoice or reference number if needed.

5. Click **Authorize**.

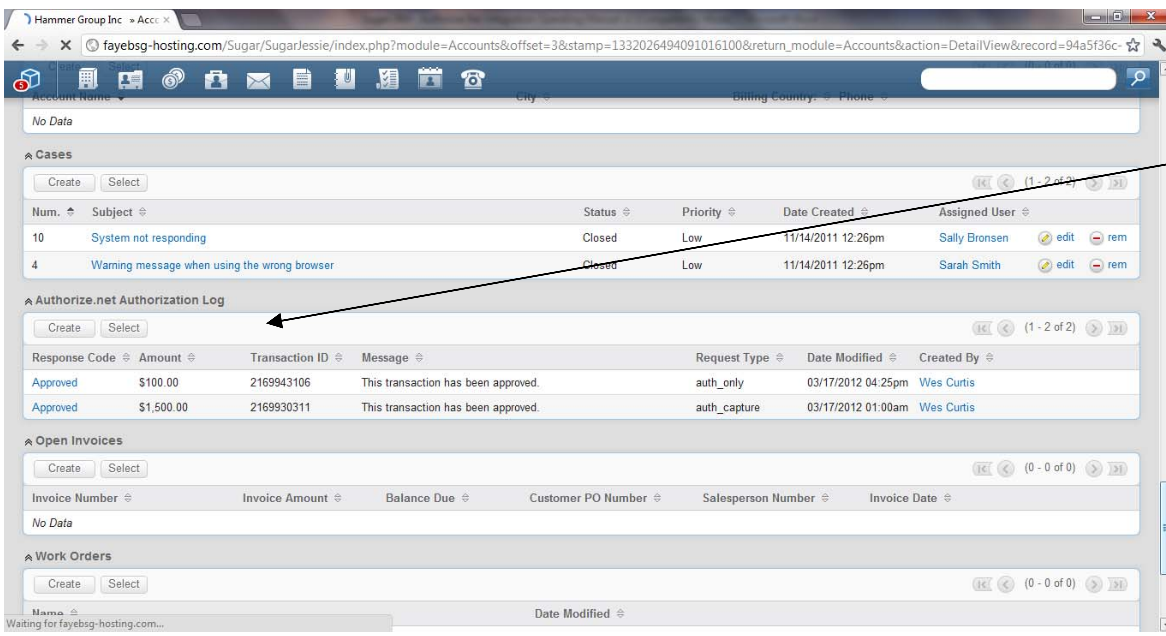


Authorizing a Credit Card (continued)

6. Click **OK** to proceed with authorizing the amount indicated.



7. Authorize.Net will return a message indicating if the transaction has succeeded or failed.
8. Click **Close** to close the authorize window.
9. Refresh the screen and scroll to the **Authorize.Net Authorization Log**. Note the new transaction is now present in the transaction history.

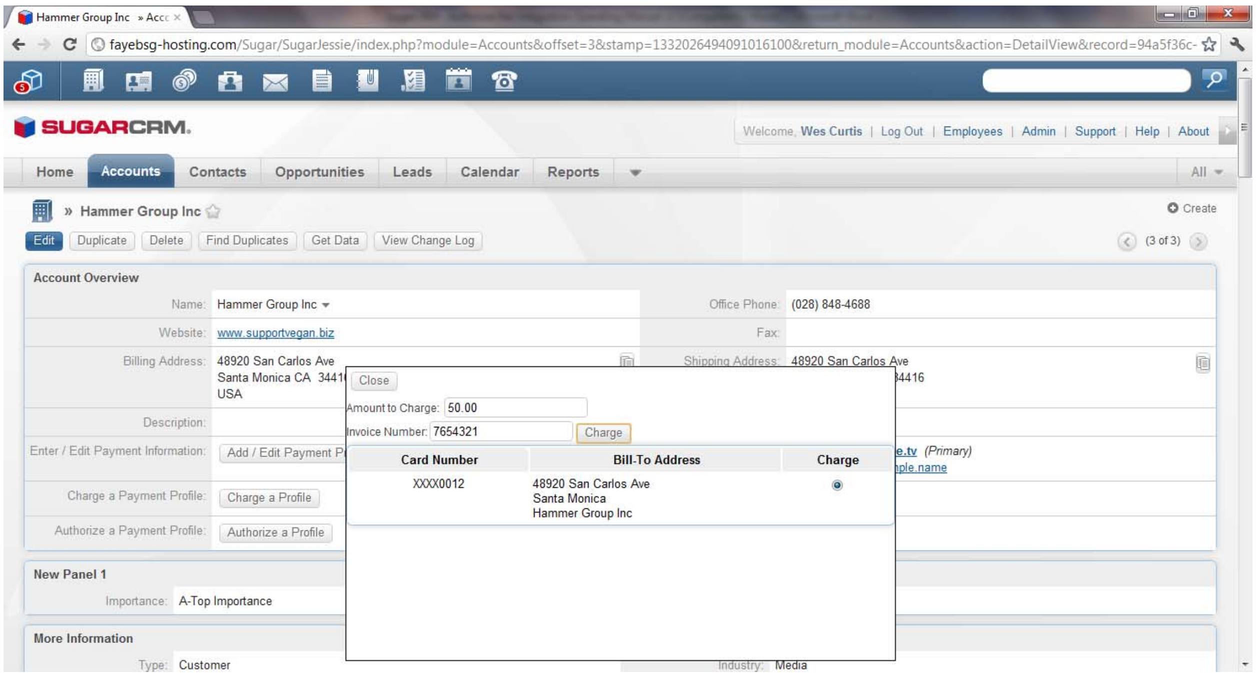


10. Note that there are two “request types” listed:

Auth_only	the card has been authorized
Auth_capture	the card has been charged

Charging a Credit Card

1. Click the **Charge a Profile** button.

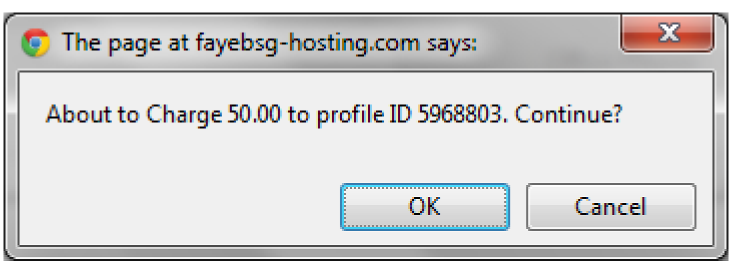


2. All credit cards on file for this account will be listed. Click the **Charge** radio button for the one you wish to select.

3. Type the dollar amount to authorize.

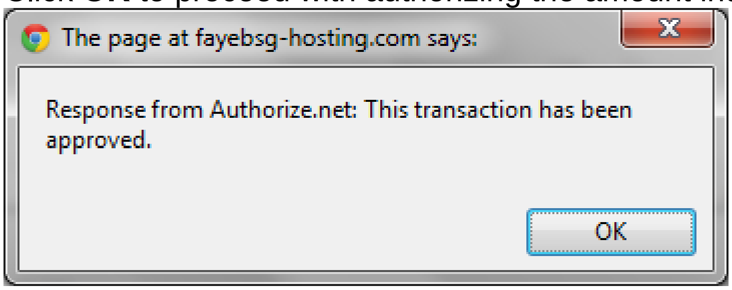
4. Type a related invoice or reference number if needed.

   Click **Charge**

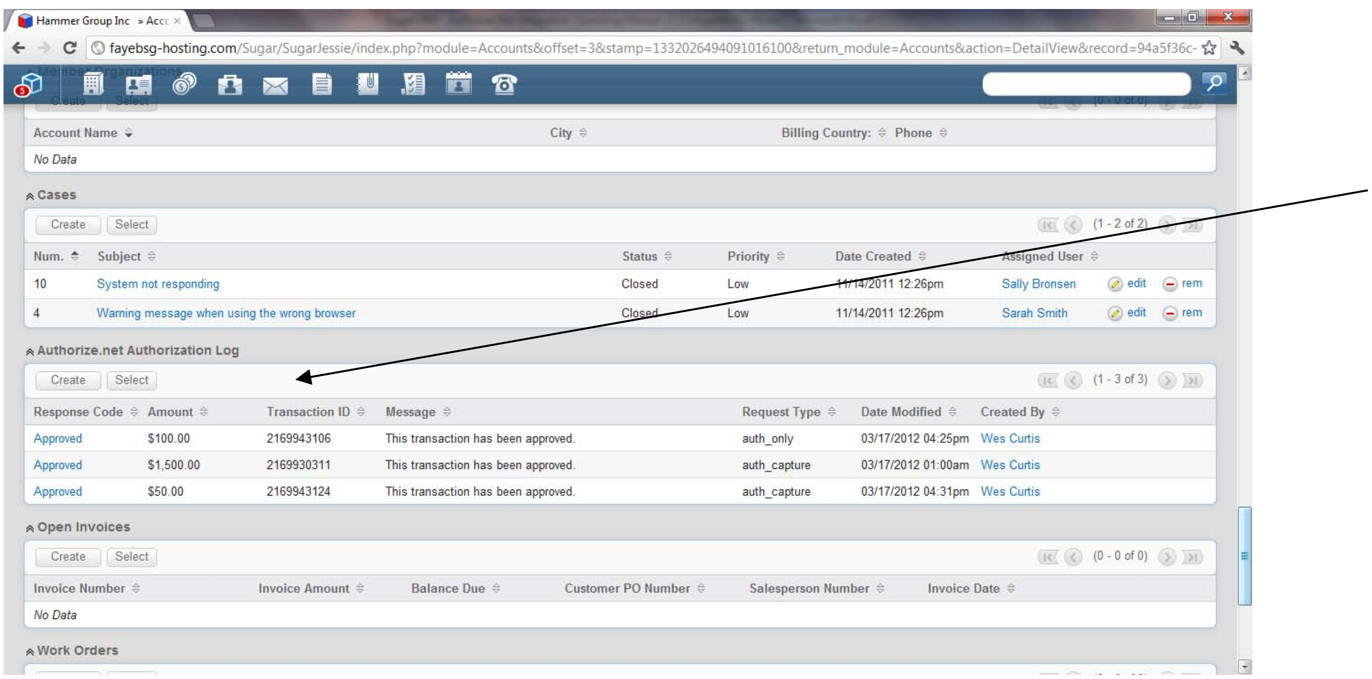


Charging a Credit Card (continued)

5. Click **OK** to proceed with authorizing the amount indicated.



6. Authorize.Net will return a message indicating if the transaction has succeeded or failed.
7. Click **Close** to close the charge window.
8. Refresh the screen and scroll to the **Authorize.Net Authorization Log**. Note the new transaction is now present in the transaction history.



9. Note that there are two "request types" listed:

Auth_only the card has been authorized
Auth_capture the card has been charged

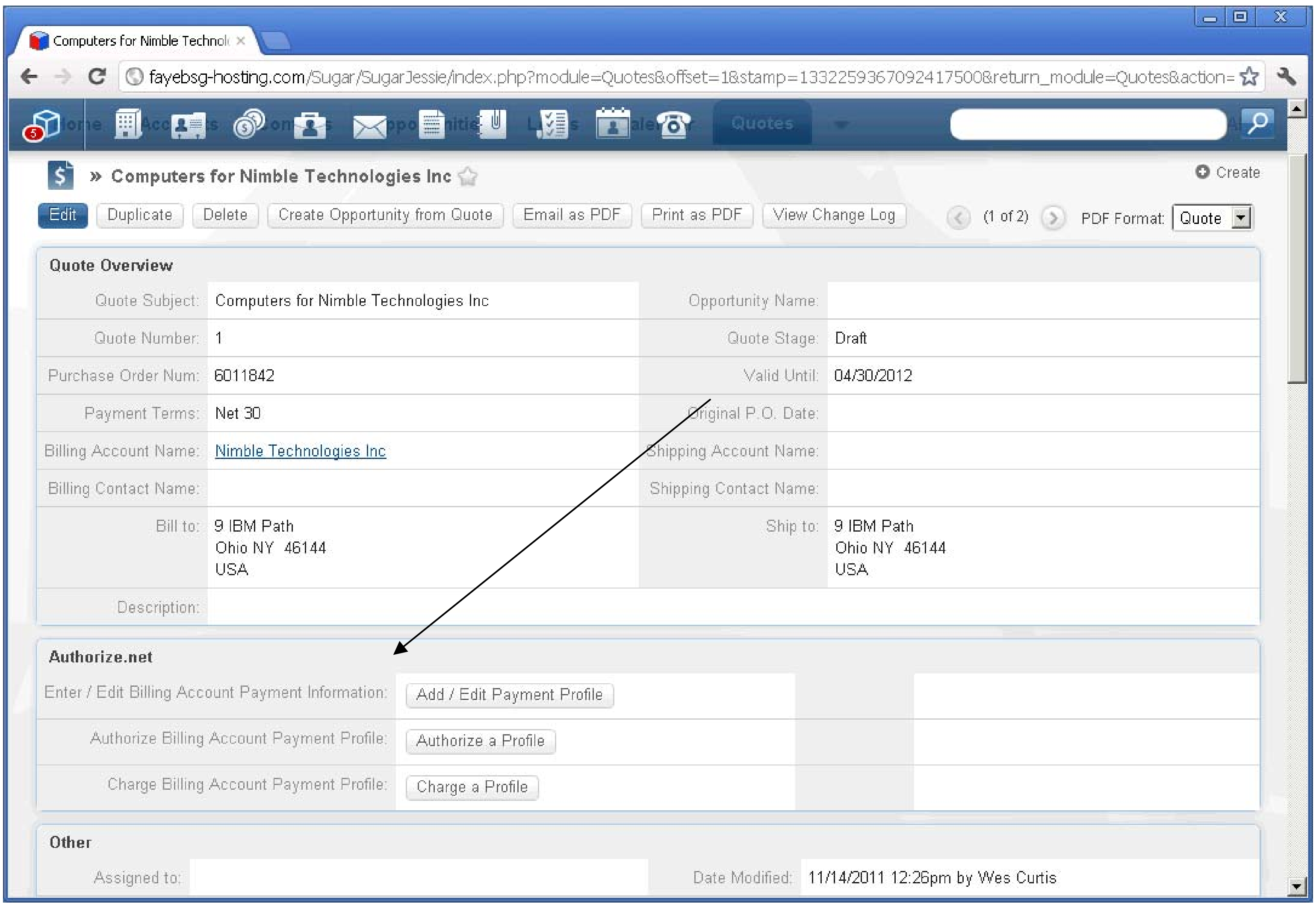
Using the Integration with Quotes

Using the Integration with Quotes

1. Enter a Quote or display an existing quote.

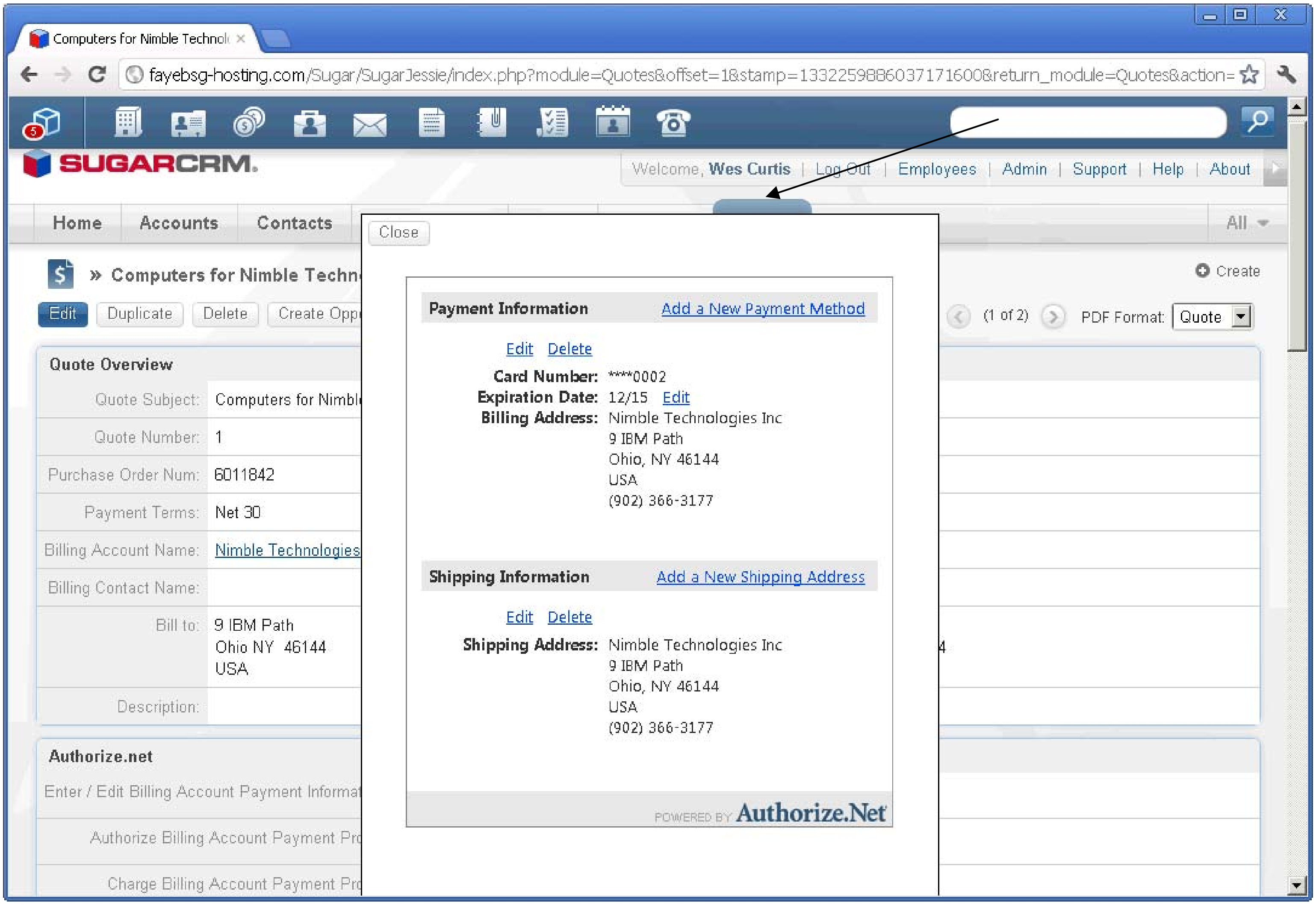
2. Note the new **Authorize.Net** section with these buttons:

   - Add/Edit Payment Profile
   - Authorize a Profile
   - Charge a Profile



Adding or Editing a Payment Profile

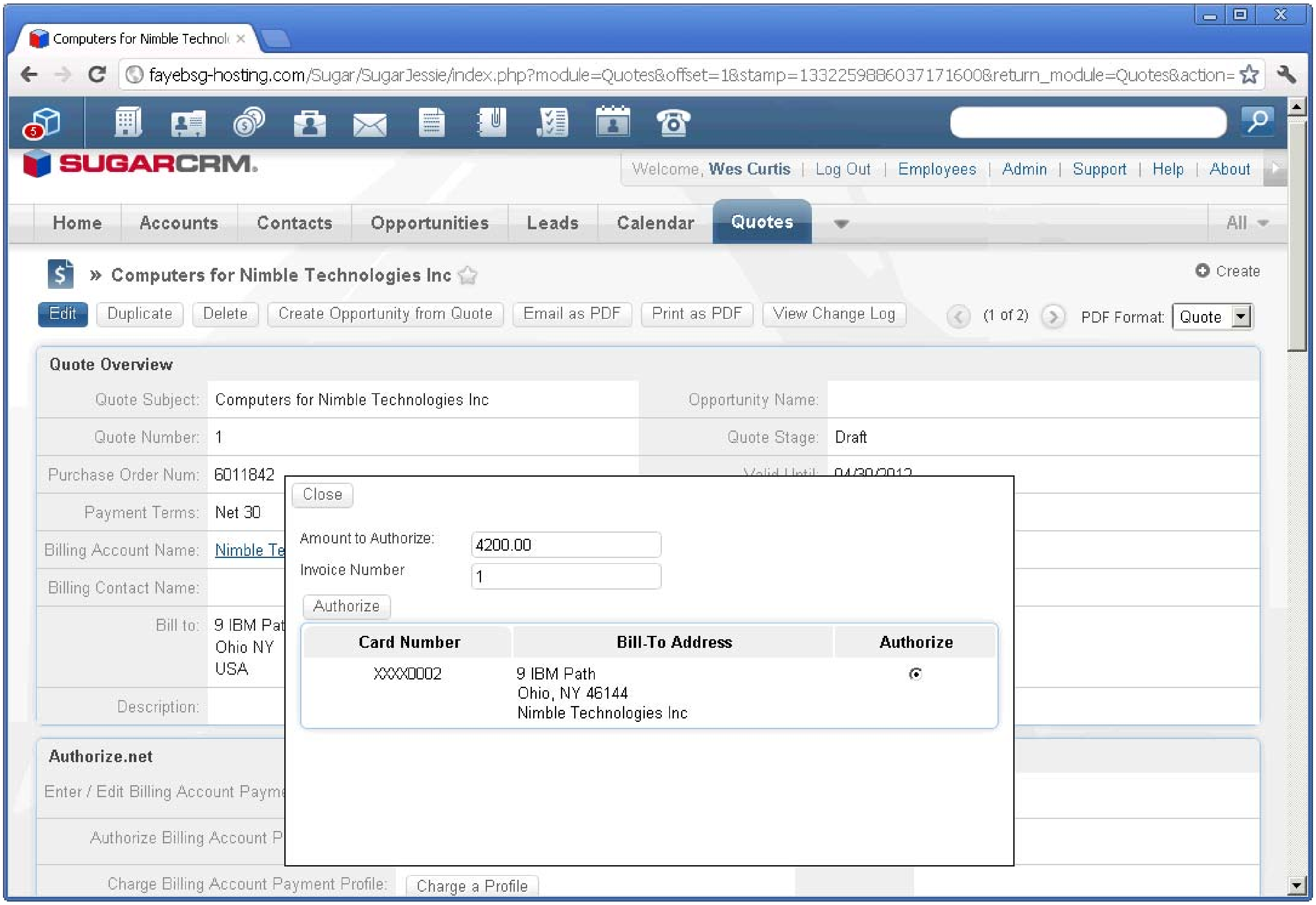
3. Click the **Add/Edit Payment Profile** button to add or edit credit card information. This data will be saved to the related account as well.



Follow the same procedures for adding or editing the information as in the **Accounts** section.

Authorizing a Credit Card

4. Click the **Authorize a Profile** button.



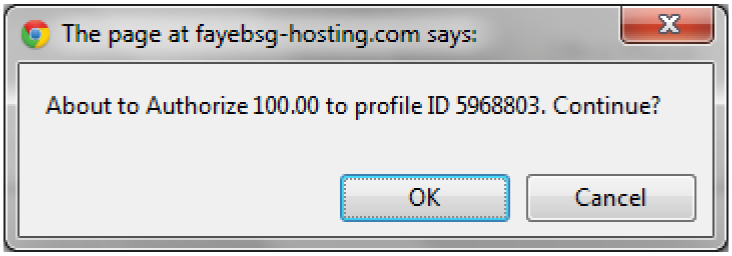
5. All credit cards on file for this account will be listed. Click the **Authorize** radio button for the one you wish to select.

6. Type the dollar amount to authorize. Note the amount defaults to the total amount of the quote.

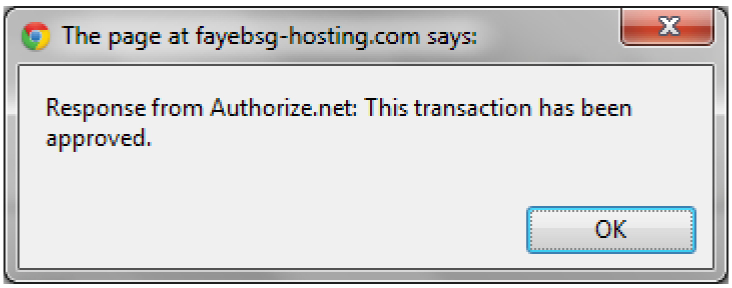
7. Type a related reference number if needed.

8. Click **Authorize**.

Authorizing a Credit Card (continued)



9. Click **OK** to proceed with authorizing the amount indicated.



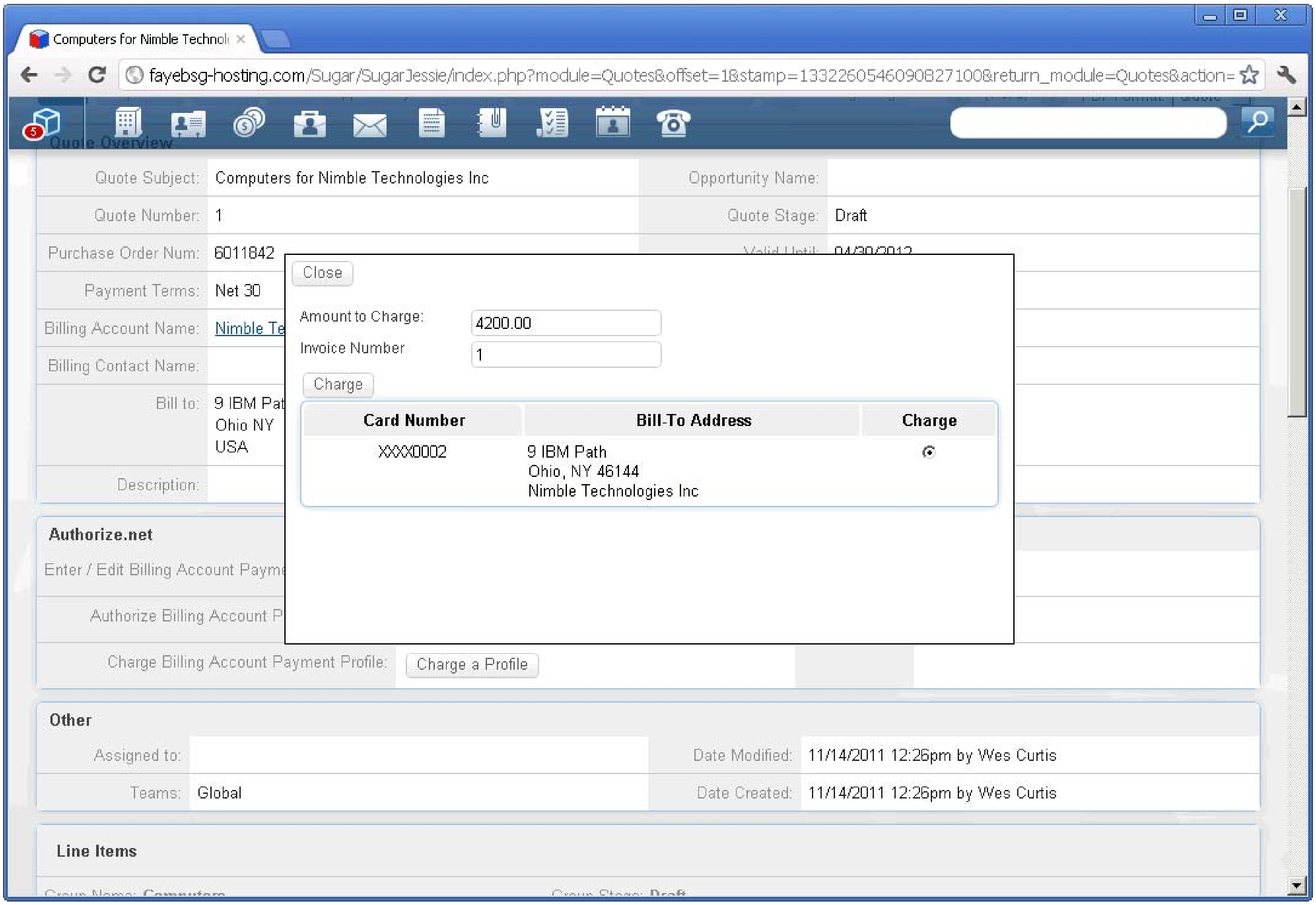
10. Authorize.Net will return a message indicating if the transaction has succeeded or failed.

11. Click **Close** to close the authorize window.

12. Check the related Accounts screen to review the transaction log for history of the transaction.

Charging a Credit Card

13. Click the **Charge a Profile** button on the *Accounts Screen*.



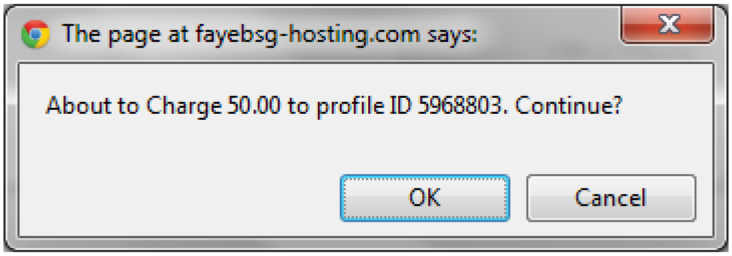
14. All credit cards on file for this account will be listed. Click the **Charge** radio button for the one you wish to select.

15. Type the dollar amount to authorize. Note the amount to charge will default to the quote amount.

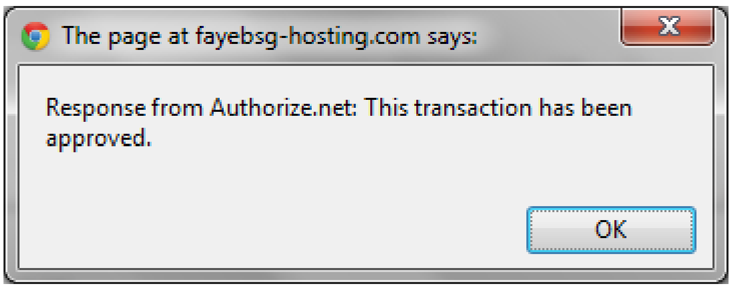
16. Type a related invoice or reference number if needed.

17. Click **Charge**

Charging a Credit Card (continued)



17. Click **OK** to proceed with authorizing the amount indicated.



18. Authorize.Net will return a message indicating if the transaction has succeeded or failed.

19. Click **Close** to close the charge window.

20. Check the related Accounts screen to review the transaction log for history of the transaction.

Technical Notes

Technical Notes

System requirements:
cURL and SimpleXMLElement enabled on web server
Sugar 6.0+ Professional, Corporate, Enterprise or Ultimate
Active Authorize.Net account

Adding the Authorize.Net Buttons to Screens

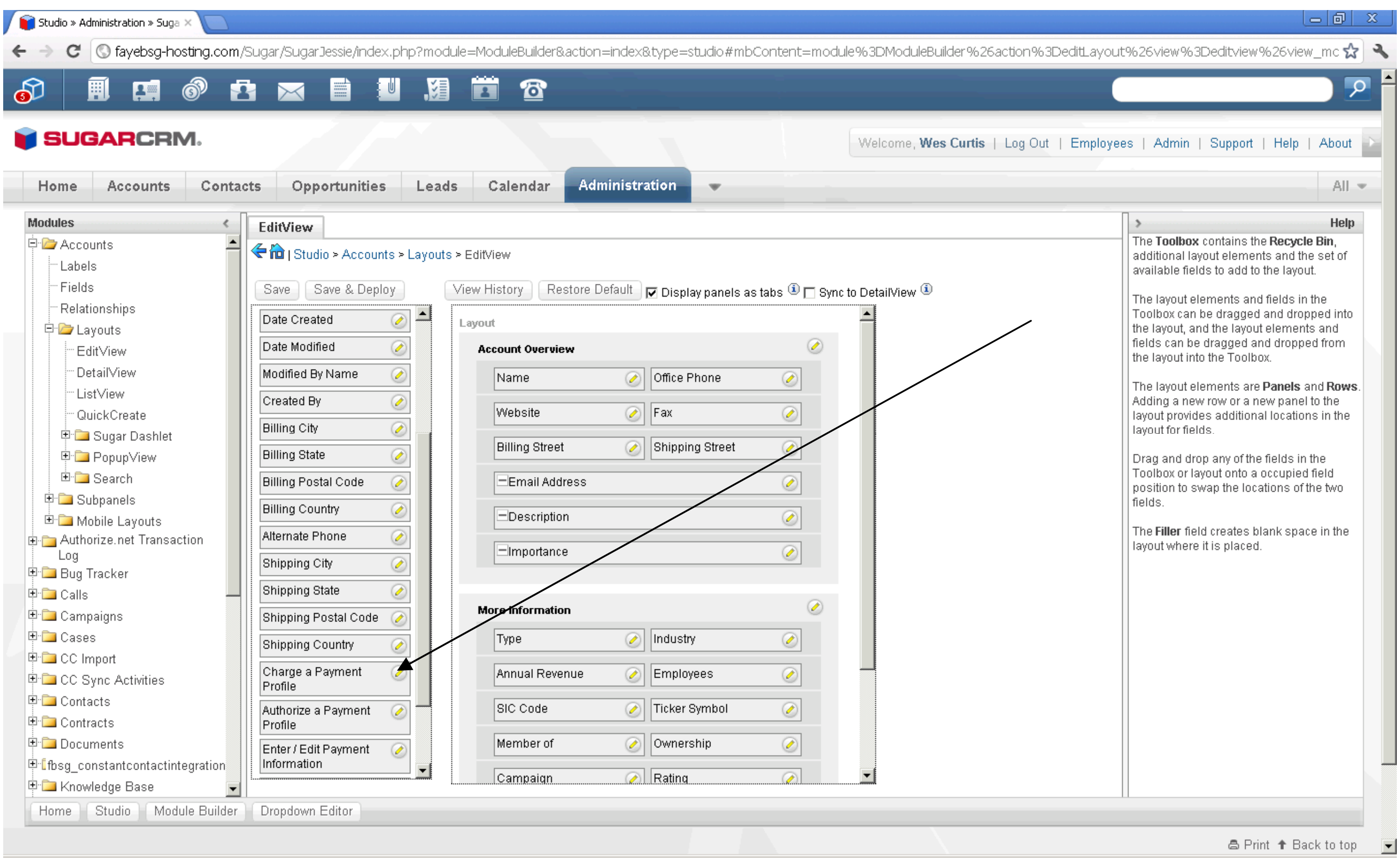
The design of our SugarCRM – Authorize.Net Integration provides users with the flexibility to place the integration functionality in a custom location of their choice (with some limitations). This is accomplished using the **Studio** module in Sugar.

There are four fields created during the installation of the integration:

Authorizenet_profile	allows user to add credit card information to a profile
Authorizenet_authorize	allows users to authorize a card
Authorizenet_charge	allows user to charge a card
Authorizenet_profile_edit	(for future use)

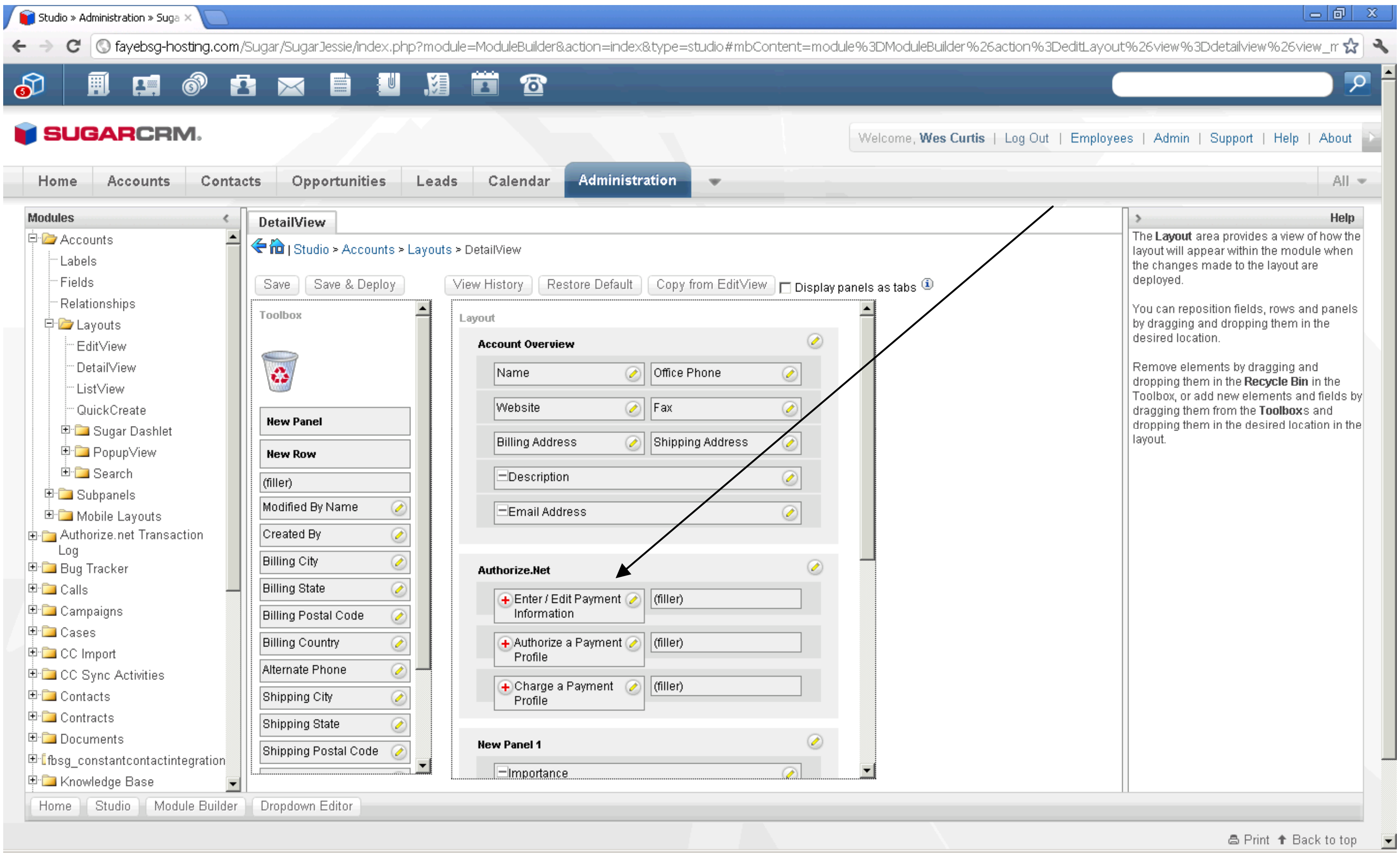
These fields have been automatically added to the ACCOUNTS, CONTACTS, and QUOTES modules. You now have the ability to add them to any screen layout desired related to these modules by using the existing functionality of the **Studio** module.

Note a standard **Edit View** from the Studio and the presence of the new integration fields:



Adding the Authorize.Net Buttons to Screens (continued)

Note how the fields look when added to the layout:



Adding the Authorize.Net Buttons to Screens (continued)

Note how the fields look on the actual screen: