

Faye Business Systems Group

SugarCRM – Authorize.Net Integration

Spec Sheet

Authorize.Net®
a CyberSource solution



Information in this document is subject to change without notice.

Copyright 2011, Faye Business Systems Group, Inc.
All rights reserved.

Trademarks

Authorize.Net is a registered trademark of Authorize.Net.

SugarCRM is a trademark of SugarCRM, Inc.

All other company and product names may be trademarks of the respective companies with which they are associated.

This documentation and the software described herein, is prepared and published under license. Neither Authorize.Net nor SugarCRM, Inc. has tested or verified either the software or any representation in this documentation regarding the software. Authorize.Net and SugarCRM do not make any warranty with respect to either this documentation or the software described herein, and specifically disclaims any warranty, express or implied, with respect hereto, including the warranties of fitness for a particular purpose and merchantability.

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

Contact Us

Email: info@fayebsg.com
Web: www.fayebsg.com
Voice: 818-227-5130
Fax: 818-227-5099
Snail: 6320 Canoga Avenue, 15th Floor
Woodland Hills, CA 91367

Table of Contents

Overview	4
Installation	6
Configuration	11
Using the Integration with Accounts and Contacts	13
Adding or Editing a Payment Profile (Credit Cards)	15
Authorizing a Profile (Card)	17
Charging a Profile (Card)	19
Reviewing Transaction History	20
Using the Integration with Quotes	21
Adding or Editing a Payment Profile (Credit Cards)	22
Authorizing a Profile (Card)	24
Charging a Profile (Card)	26
Technical Notes	28
Adding the Authorize.Net Buttons to Screens	29

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:

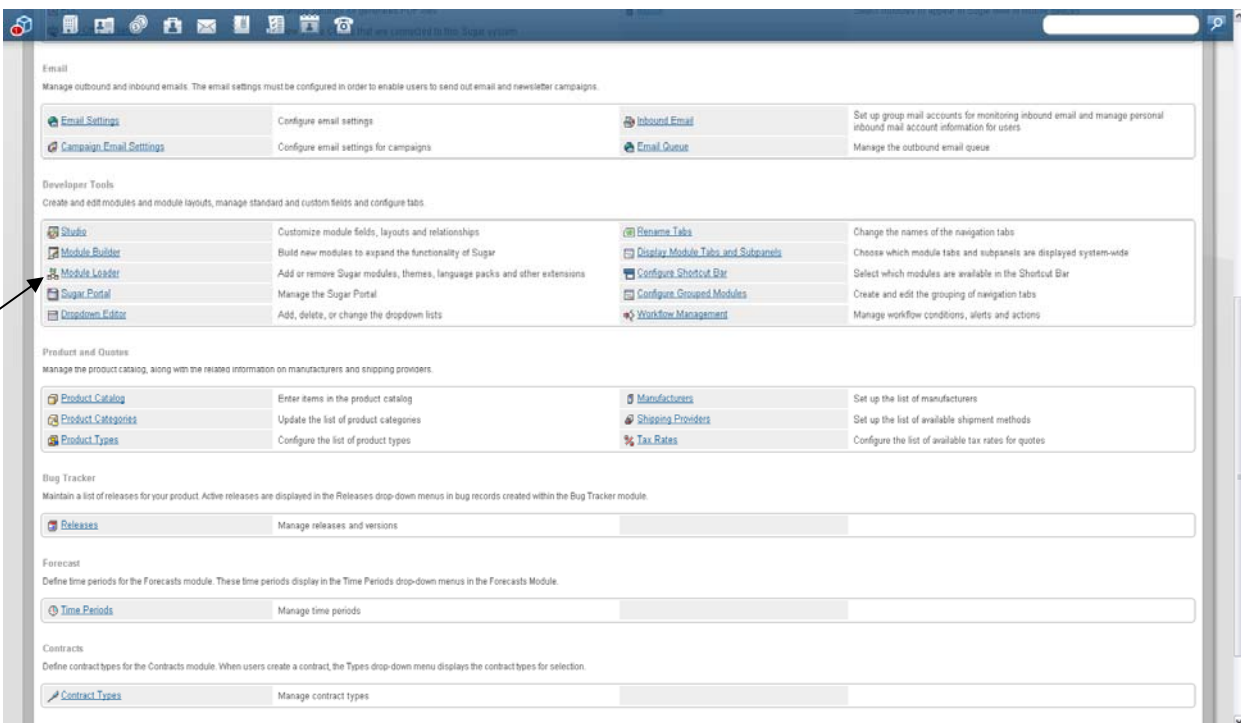
- A. Installation of the SugarCRM – Authorize.Net Integration module within SugarCRM**
- B. Configuration of module**

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

FBSG_SugarCRM_AuthorizeNetIntegration.zip

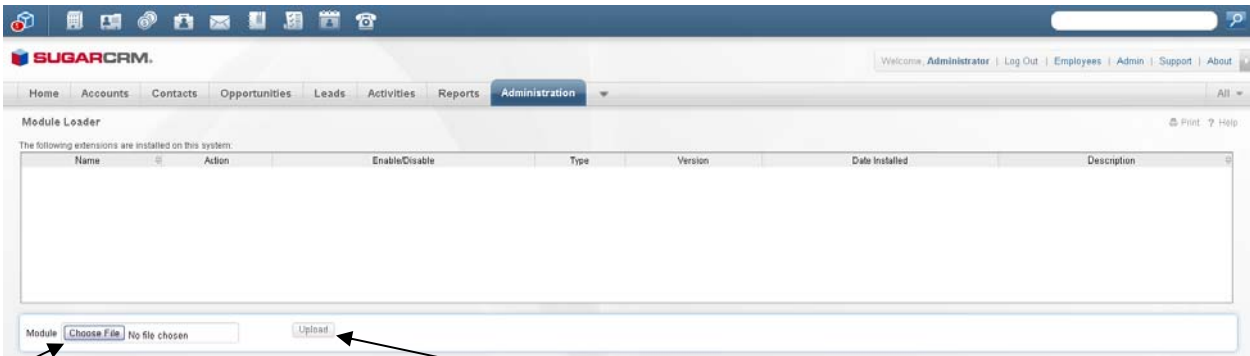
Procedures – Installation

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.'

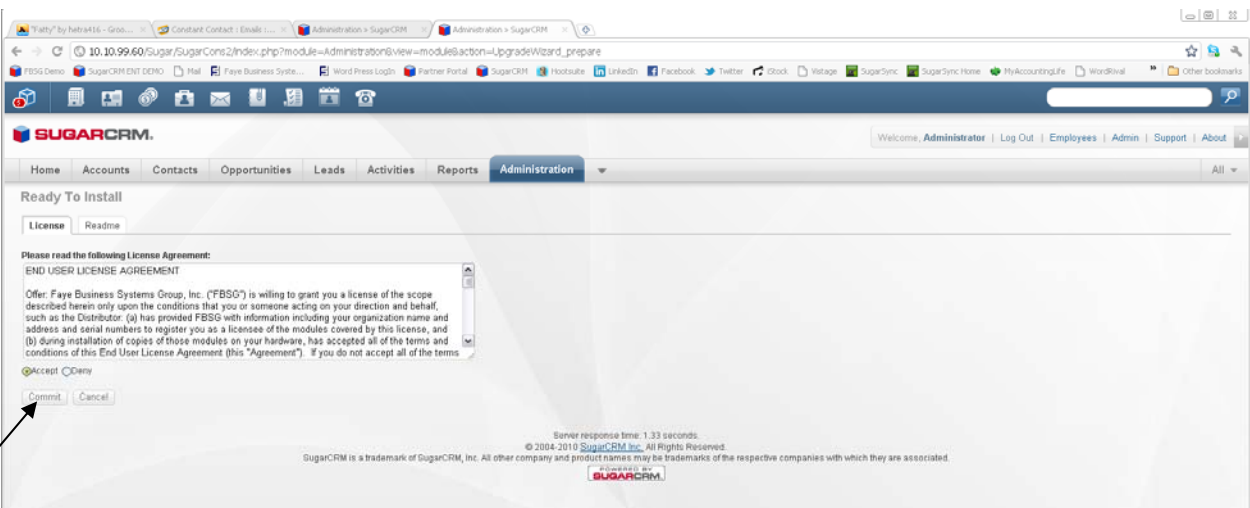


Procedures – Installation (Continued)

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



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

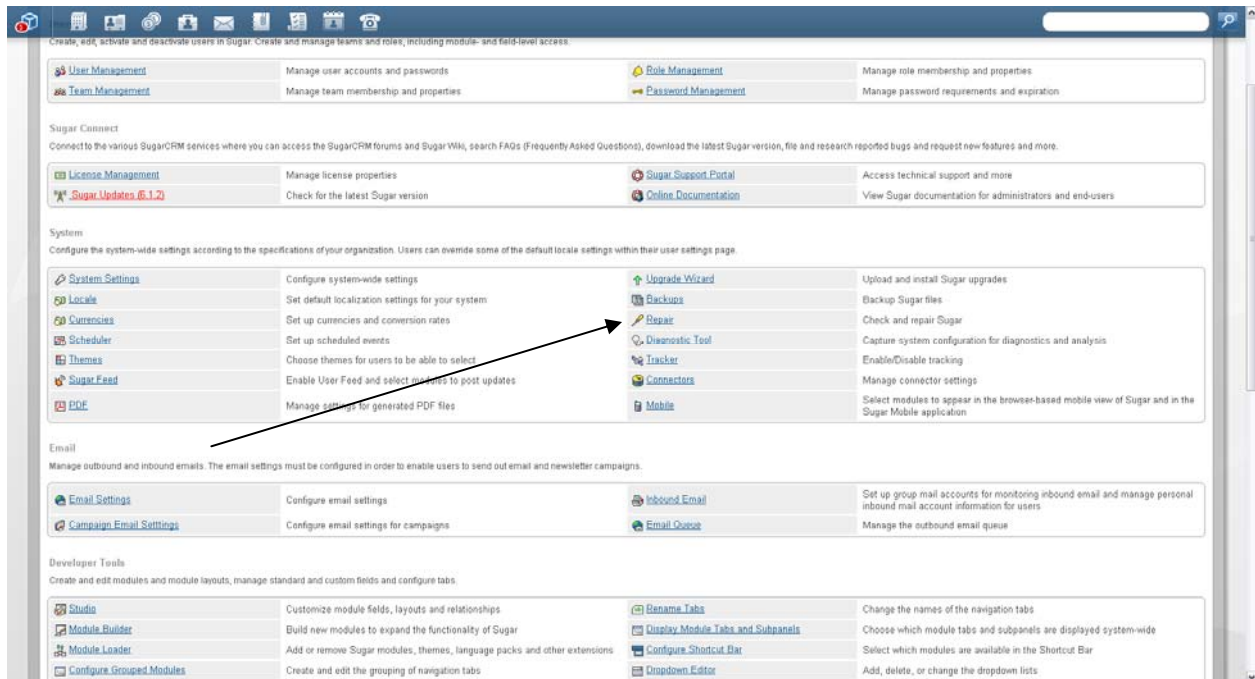


6. The module will install.

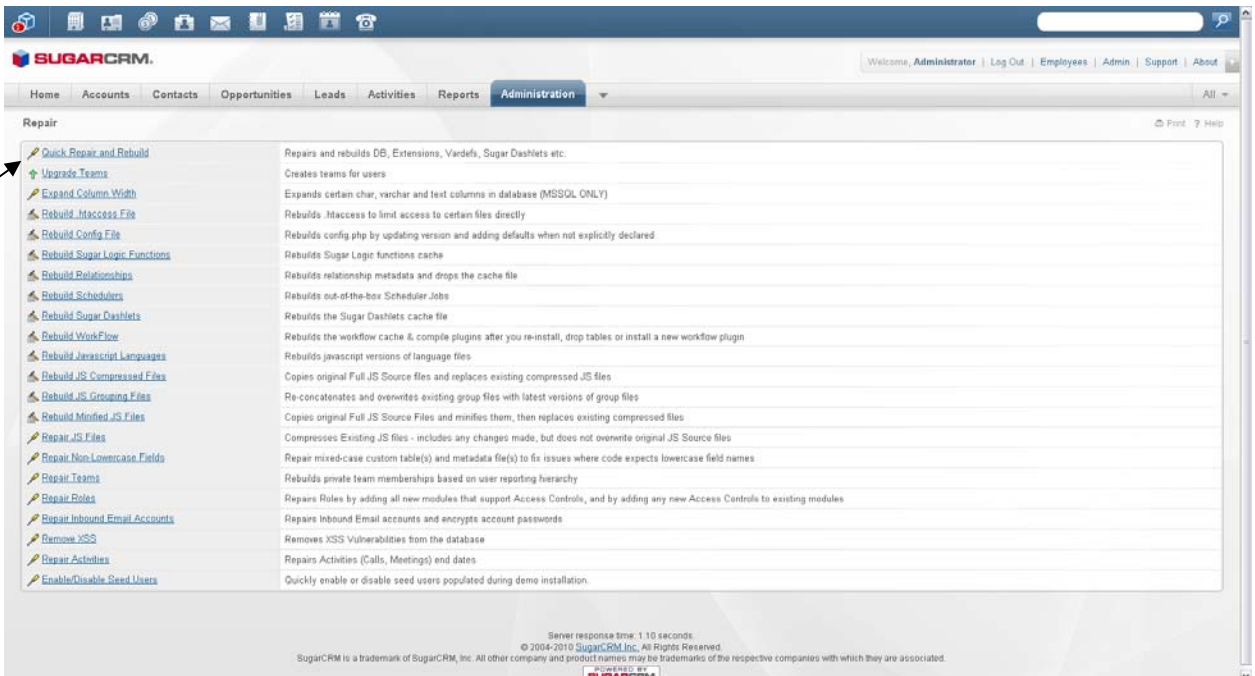


Procedures – Installation (Continued)

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

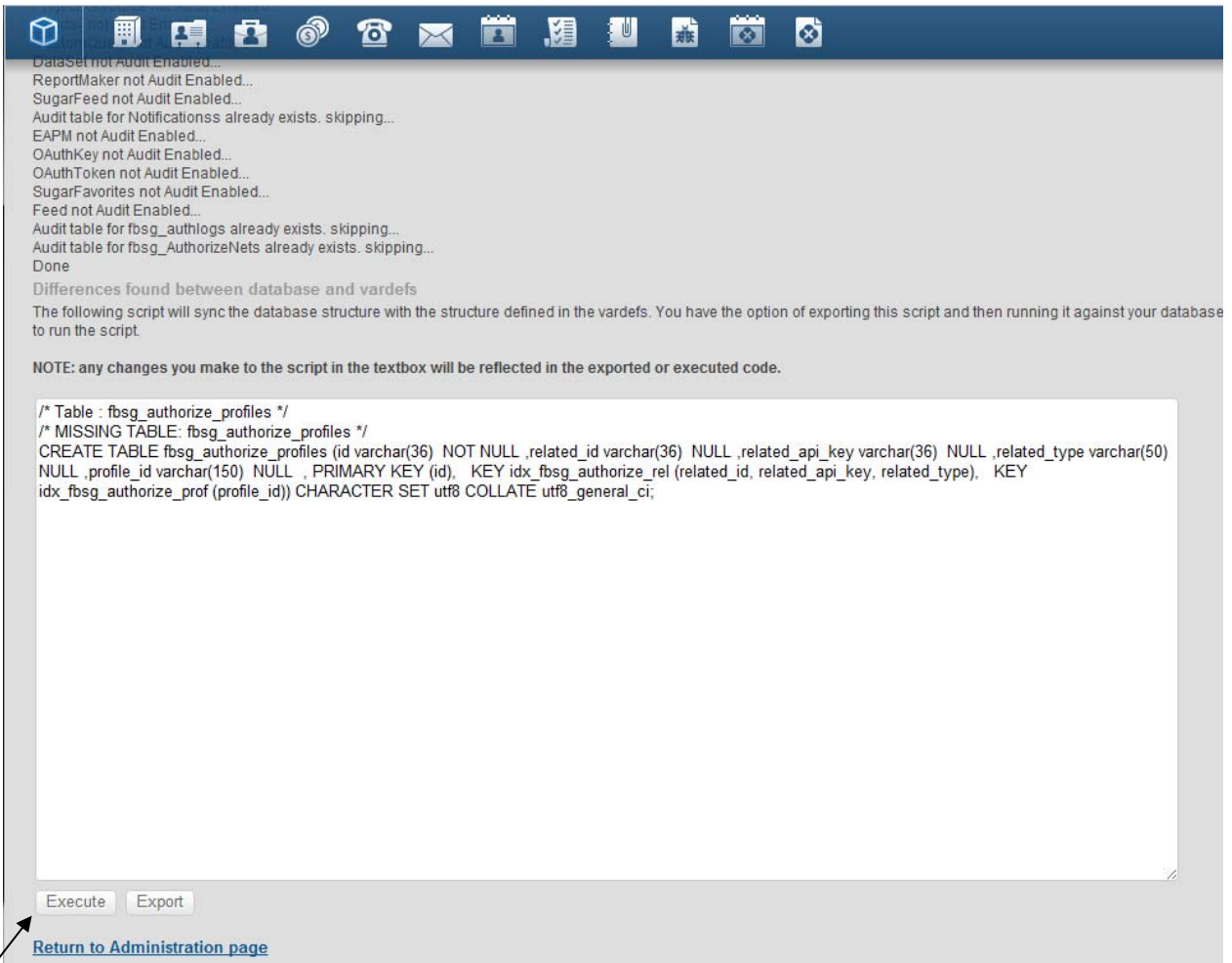


8. Click 'Quick Repair and Rebuild'.



Procedures – Installation (Continued)

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

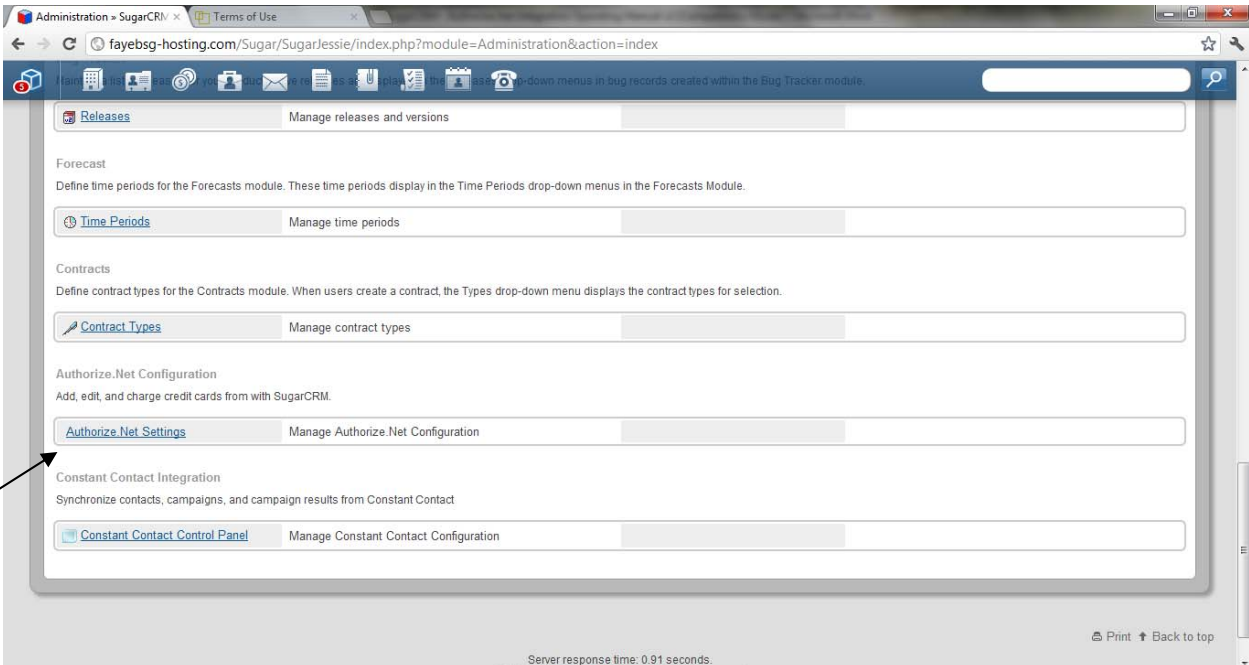


Configuration

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.

- 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.

- 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.



The screenshot shows the Authorize.Net login interface. At the top left is the Authorize.Net logo with the tagline 'a CyberSource solution'. Below the logo is a promotional banner for 'Merchants Lost \$2.7 Billion to Online Fraud in 2010', which promotes the 'Advanced Fraud Detection Suite™' for \$9.95/month. To the right of the banner is a 'Please Log In!' section with input fields for 'Login ID:' and 'Password:', a 'Log In' button, and links for 'Forgot Your Password?' and 'Forgot Your Login ID?'. A small pop-up window is overlaid on the banner, showing four transaction options with radio buttons: 'Process as normal and report filter(s) triggered' (checked), 'Authorize and hold for review.', 'Do not authorize, but hold for review.', and 'Decline the transaction.'

2. Click 'Account'



[Feedback](#) | [Contact Us](#) | [Help](#) | [Log Out](#)

[Home](#)
[Tools](#)
[Reports](#)
[Search](#)
[Account](#)

[Virtual Terminal](#) | [Unsettled Transactions](#)

ANNOUNCEMENTS

2/16/12 **New**
New ARB Reporting Capabilities

2/14/12 **New**
Reminder to Download Transactions

TOOLS

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

REPORTS


Transaction Detail
Transaction Statistics
Returns
Notice of Change
QuickBooks Download

SEARCH

Search by Batch
Search by Business Day
Unsettled Transactions
Suspicious Transactions

ACCOUNT


Settings
Billing Information
Statements
User Administration
User Profile



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)

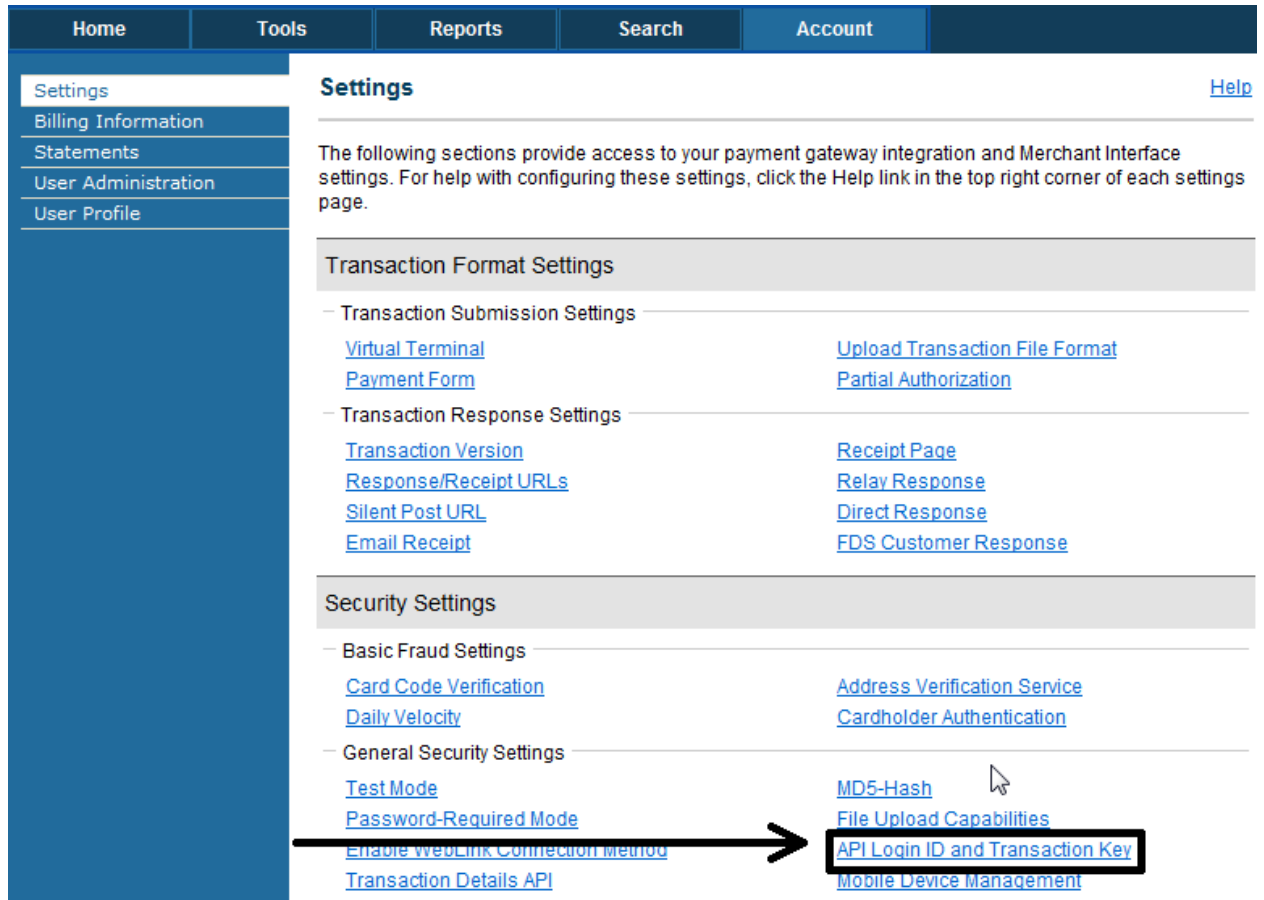
The Advanced Fraud Detection Suite safeguards your account using powerful transaction filters and IP address tools to identify and prevent suspicious transactions. Flexible settings allow you to customize the transaction filters to meet your unique business needs.



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

3. Click 'API Login ID and Transaction Key'



Home Tools Reports Search Account

Settings [Help](#)

Billing Information
Statements
User Administration
User Profile

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](#)
 - [Receipt Page](#)
 - [Relay Response](#)
 - [Direct Response](#)
 - [FDS Customer Response](#)
 - [Response/Receipt URLs](#)
 - [Silent Post URL](#)
 - [Email Receipt](#)

Security Settings

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

- 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.

Authorize.Net
 a CyberSource solution

Feedback | Contact Us | Help | Log Out

Home | Tools | Reports | Search | Account

Settings
 Billing Information
 Statements
 User Administration
 User Profile

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: ←

API Login ID Last Obtained: 03/16/2012 22:36:50

Transaction Key Last Obtained: 03/26/2012 15:10:00

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 is your pet's name?

Secret Answer: *

☐ Disable Old Transaction Key(s)

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

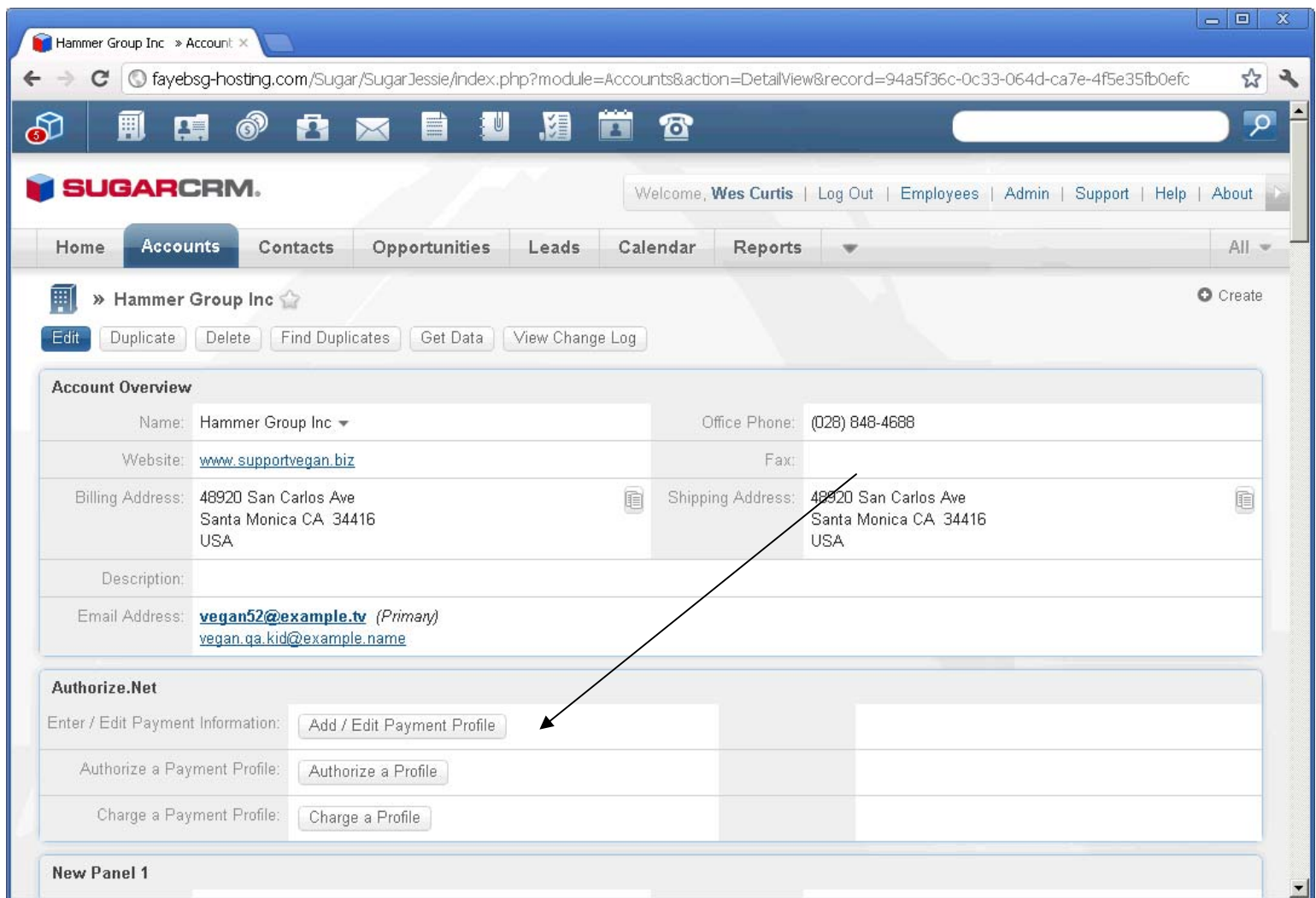
Terms of Use | Privacy Policy

© 2005, 2012. Authorize.Net is a registered trademark of CyberSource Corporation.
All other marks are the property of their respective owners. All rights reserved.

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



Hammer Group Inc » Account

fayebsg-hosting.com/Sugar/SugarJessie/index.php?module=Accounts&action=DetailView&record=94a5f36c-0c33-064d-ca7e-4f5e35fb0efc

SUGARCRM. Welcome, **Wes Curtis** | Log Out | Employees | Admin | Support | Help | About

Home Accounts Contacts Opportunities Leads Calendar Reports All

» Hammer Group Inc Create

Edit Duplicate Delete Find Duplicates Get Data View Change Log

Account Overview

Name:	Hammer Group Inc	Office Phone:	(028) 848-4688
Website:	www.supportvegan.biz	Fax:	
Billing Address:	48920 San Carlos Ave Santa Monica CA 34416 USA	Shipping Address:	48920 San Carlos Ave Santa Monica CA 34416 USA
Description:			
Email Address:	vegan52@example.tv (Primary) vegan.qa.kid@example.name		

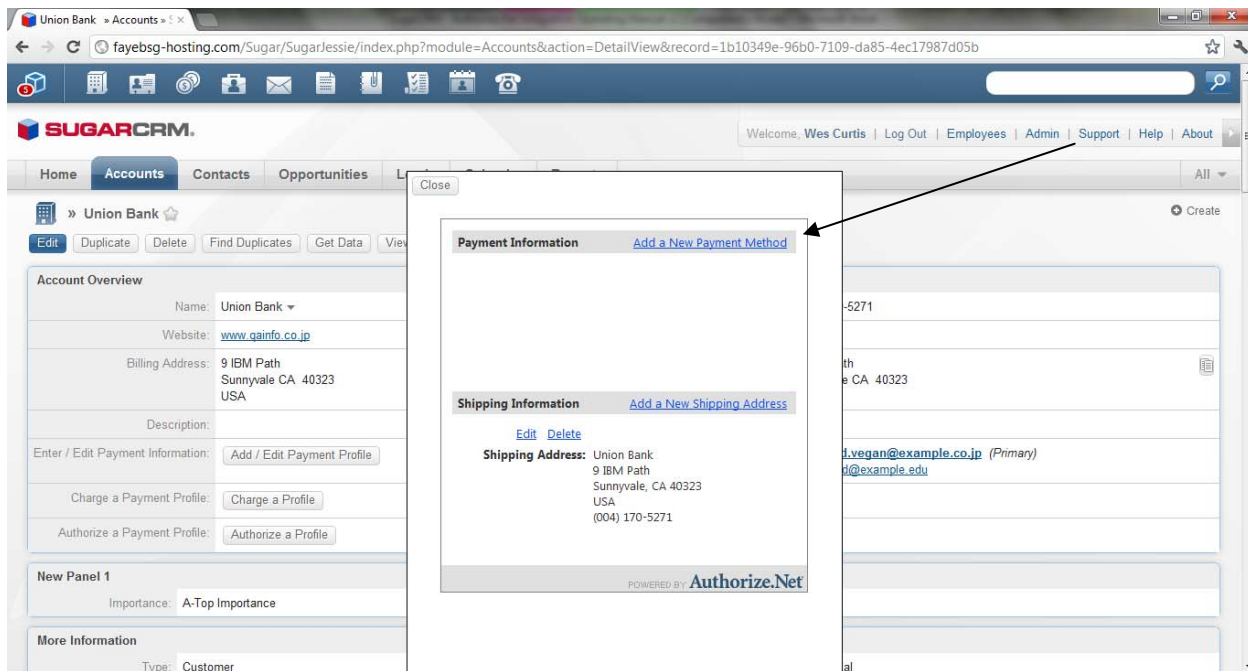
Authorize.Net

Enter / Edit Payment Information:	Add / Edit Payment Profile
Authorize a Payment Profile:	Authorize a Profile
Charge a Payment Profile:	Charge a Profile

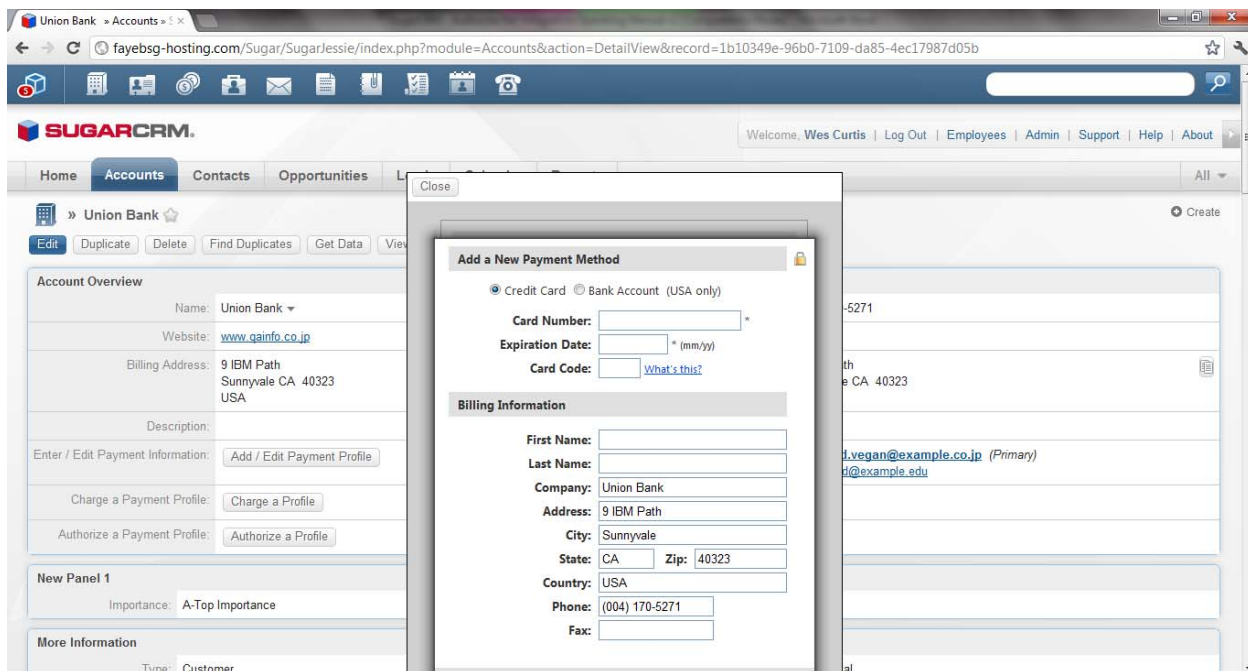
New Panel 1

Adding or Editing a Payment Profile

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



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

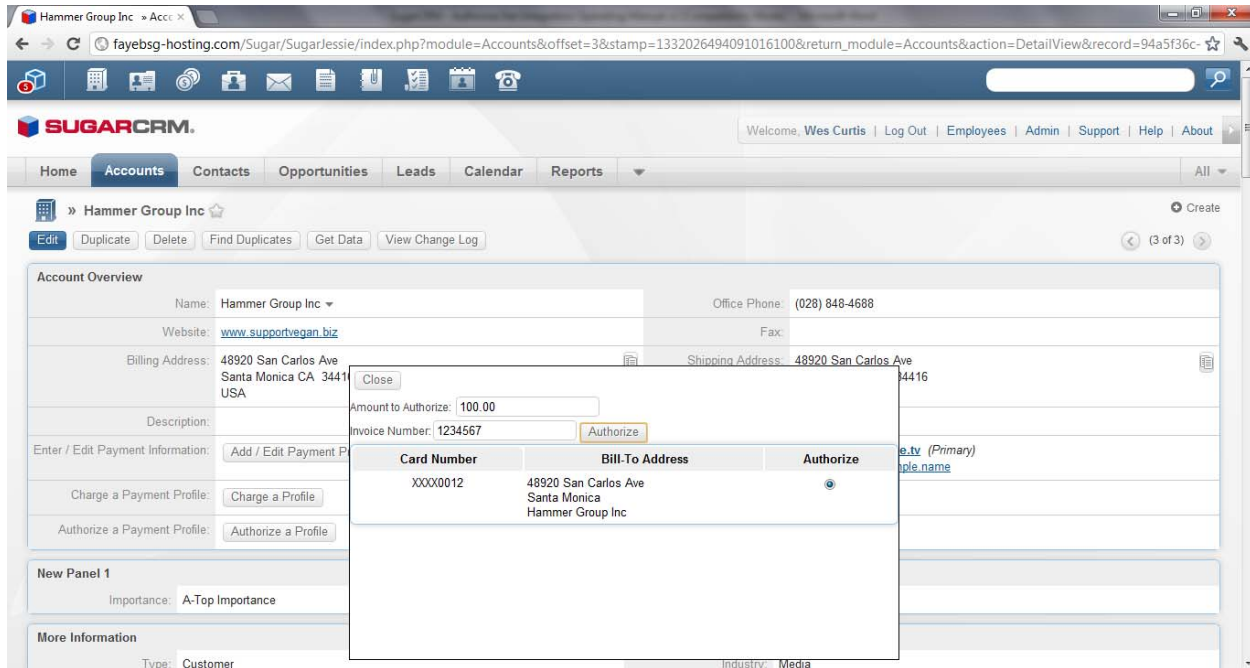


Adding or Editing a Payment Profile (continued)

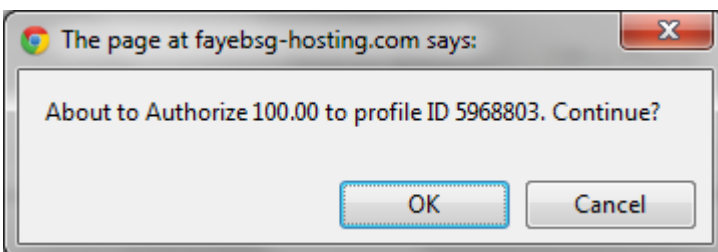
3. Enter the information as indicated and click **SAVE**.
 - A valid credit card number must be entered on this screen.
 - Multiple credit cards may be saved under each account.

Authorizing a Credit Card

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

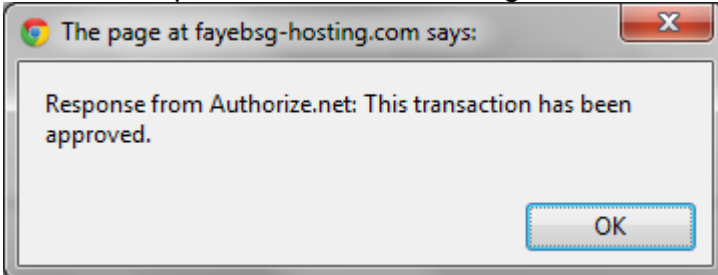


2. All credit cards on file for this account or contact will be listed. Click the **Authorize** radio button for the one you wish to select.
3. Type the dollar amount to authorize.
4. Type a related invoice or reference number if needed.
5. Click **Authorize**.

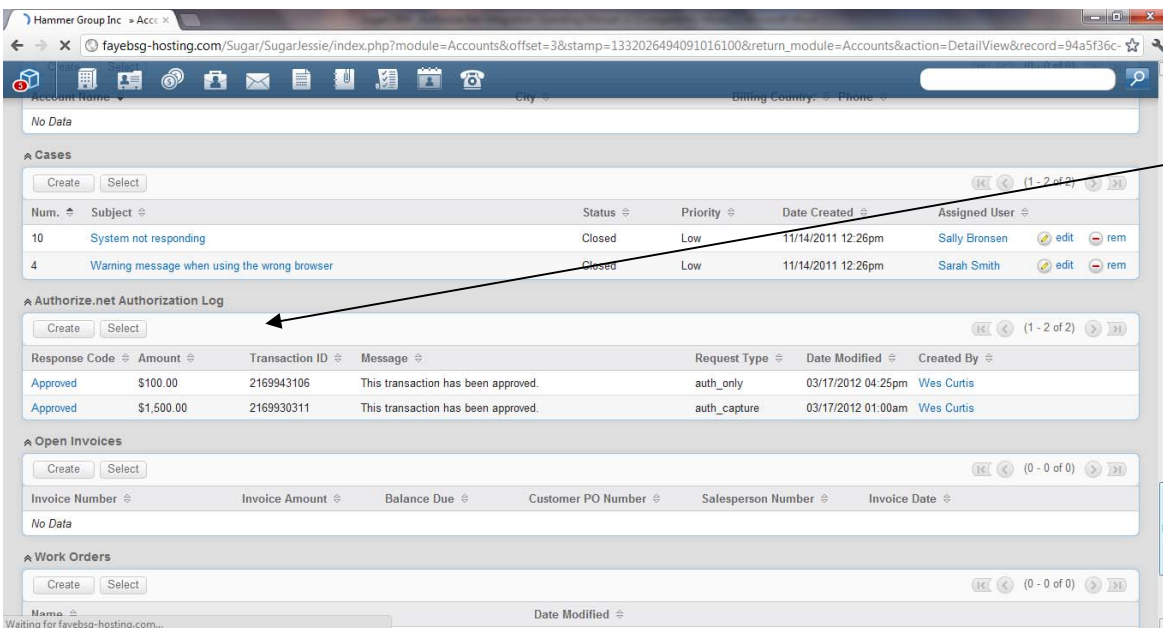


Authorizing a Credit Card (continued)

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



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



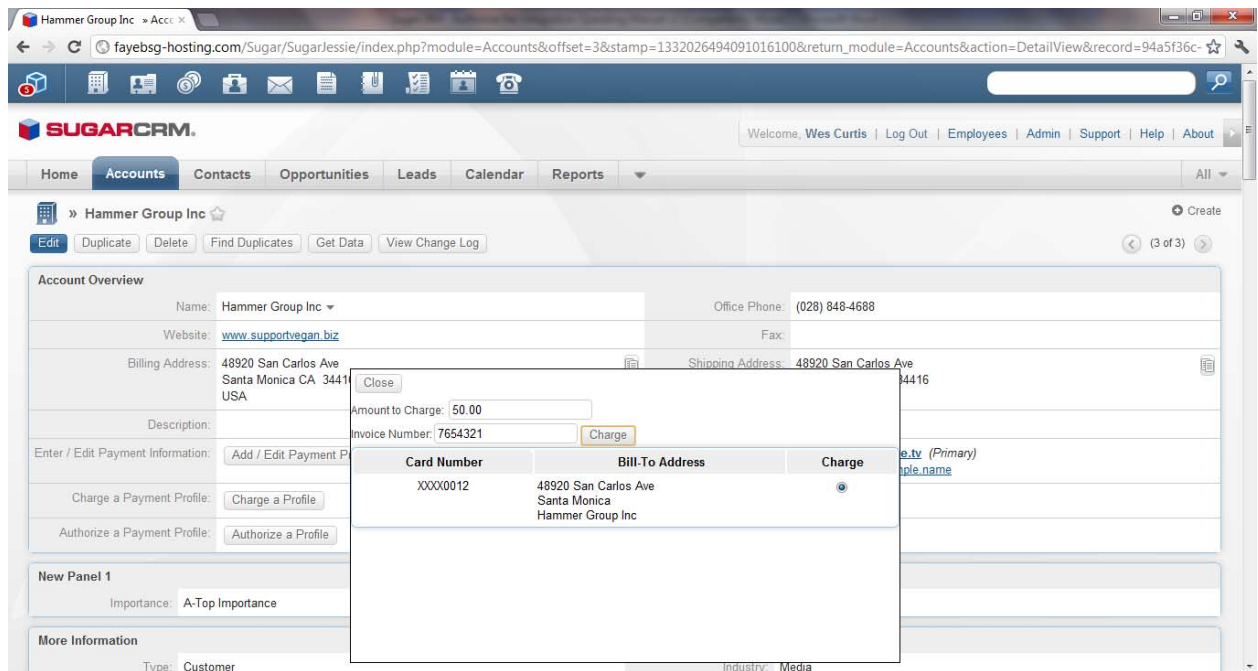
- Note that there are two “request types” listed:

Auth_only
 Auth_capture

the card has been authorized
 the card has been charged

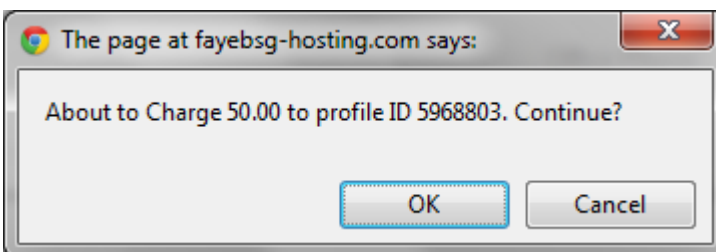
Charging a Credit Card

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



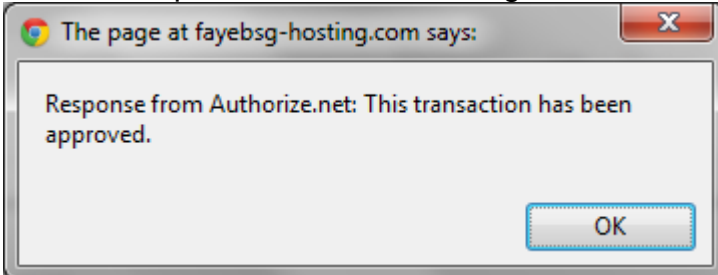
2. All credit cards on file for this account will be listed. Click the **Charge** radio button for the one you wish to select.
3. Type the dollar amount to authorize.
4. Type a related invoice or reference number if needed.

Click **Charge**

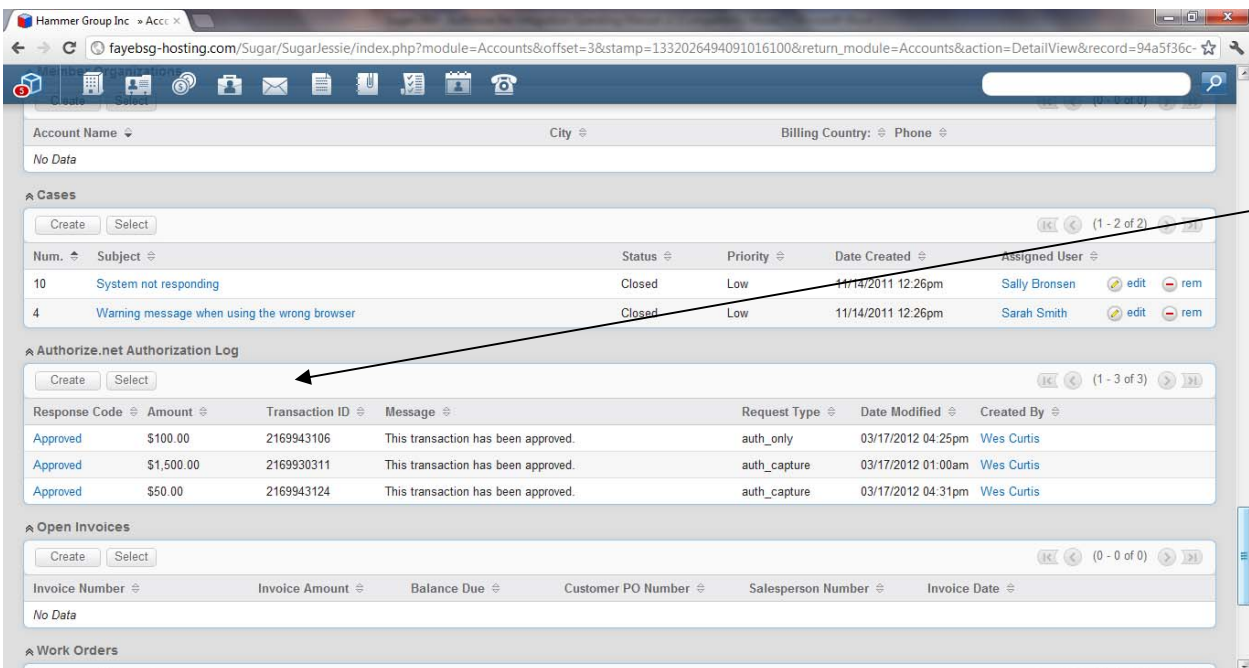


Charging a Credit Card (continued)

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



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



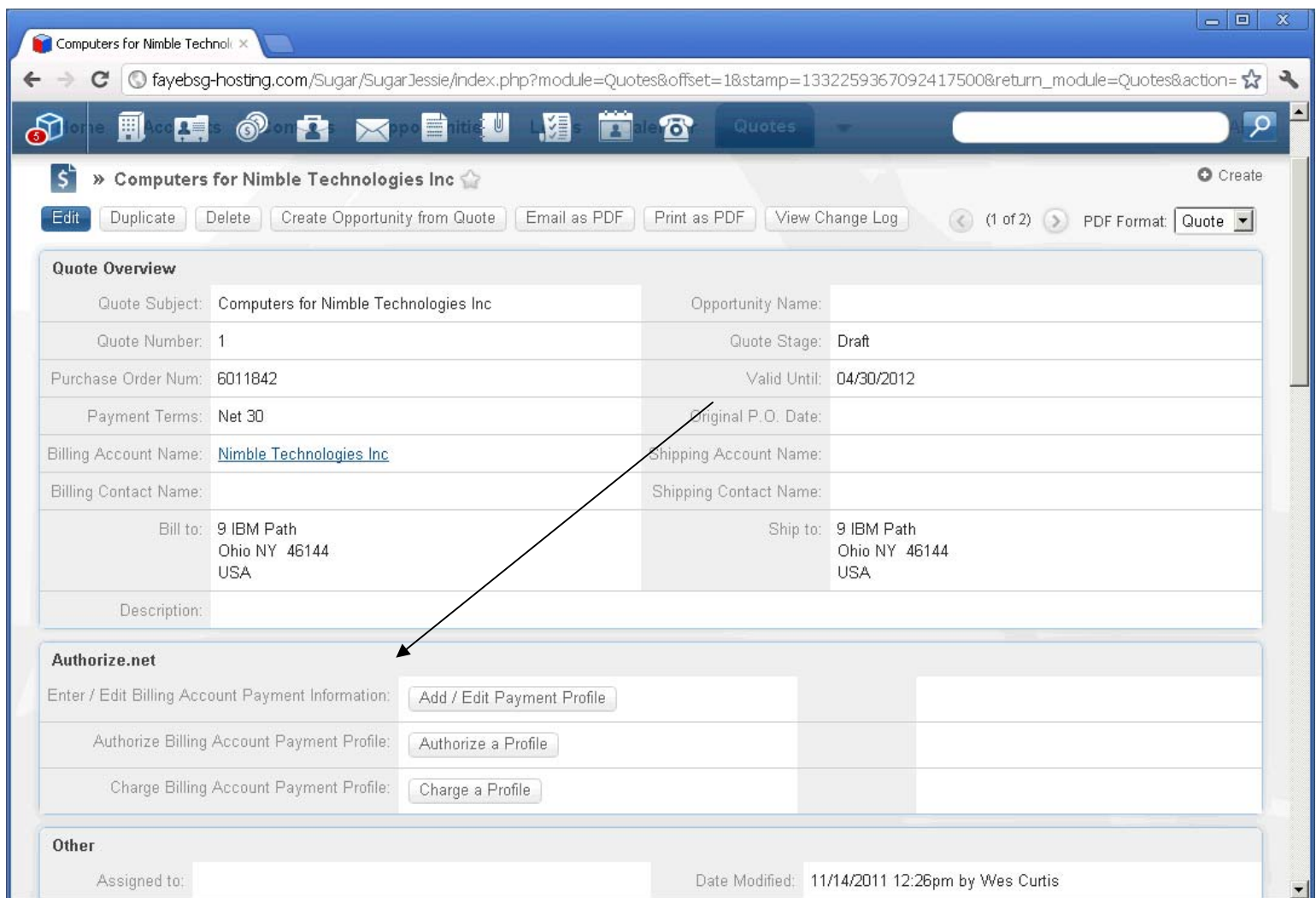
- Note that there are two “request types” listed:

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



Computers for Nimble Technologies Inc

fayebsg-hosting.com/Sugar/SugarJessie/index.php?module=Quotes&offset=1&stamp=1332259367092417500&return_module=Quotes&action=

Home Accounts Opportunities Contacts Lists Alerts Quotes

» Computers for Nimble Technologies Inc

Edit Duplicate Delete Create Opportunity from Quote Email as PDF Print as PDF View Change Log (1 of 2) PDF Format: Quote

Quote Overview

Quote Subject:	Computers for Nimble Technologies Inc	Opportunity Name:	
Quote Number:	1	Quote Stage:	Draft
Purchase Order Num:	6011842	Valid Until:	04/30/2012
Payment Terms:	Net 30	Original P.O. Date:	
Billing Account Name:	Nimble Technologies Inc	Shipping Account Name:	
Billing Contact Name:		Shipping Contact Name:	
Bill to:	9 IBM Path Ohio NY 46144 USA	Ship to:	9 IBM Path Ohio NY 46144 USA
Description:			

Authorize.net

Enter / Edit Billing Account Payment Information: Add / Edit Payment Profile

Authorize Billing Account Payment Profile: Authorize a Profile

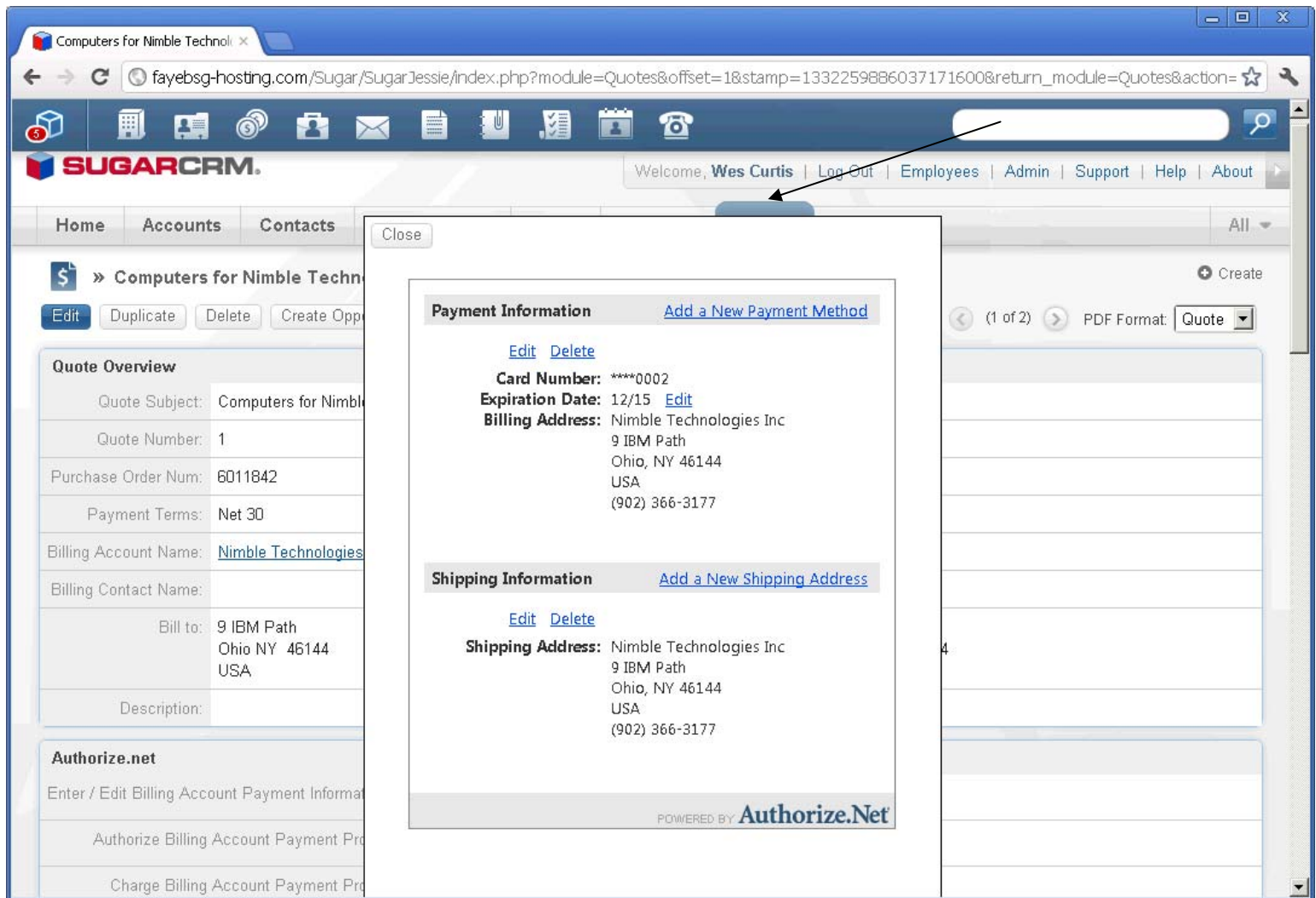
Charge Billing Account Payment Profile: Charge a Profile

Other

Assigned to: Date Modified: 11/14/2011 12:26pm by Wes Curtis

Adding or Editing a Payment Profile

- 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.



The screenshot displays the SugarCRM interface with a modal window open for editing payment information. The modal is titled 'Payment Information' and includes a link to 'Add a New Payment Method'. It contains the following fields:

- Card Number:** ****0002
- Expiration Date:** 12/15 [Edit](#)
- Billing Address:** Nimble Technologies Inc
9 IBM Path
Ohio, NY 46144
USA
(902) 366-3177

Below the payment information, there is a 'Shipping Information' section with a link to 'Add a New Shipping Address' and a 'Shipping Address' field with the same address as the billing address.

The background interface shows a quote for 'Computers for Nimble Technologies' with the following details:

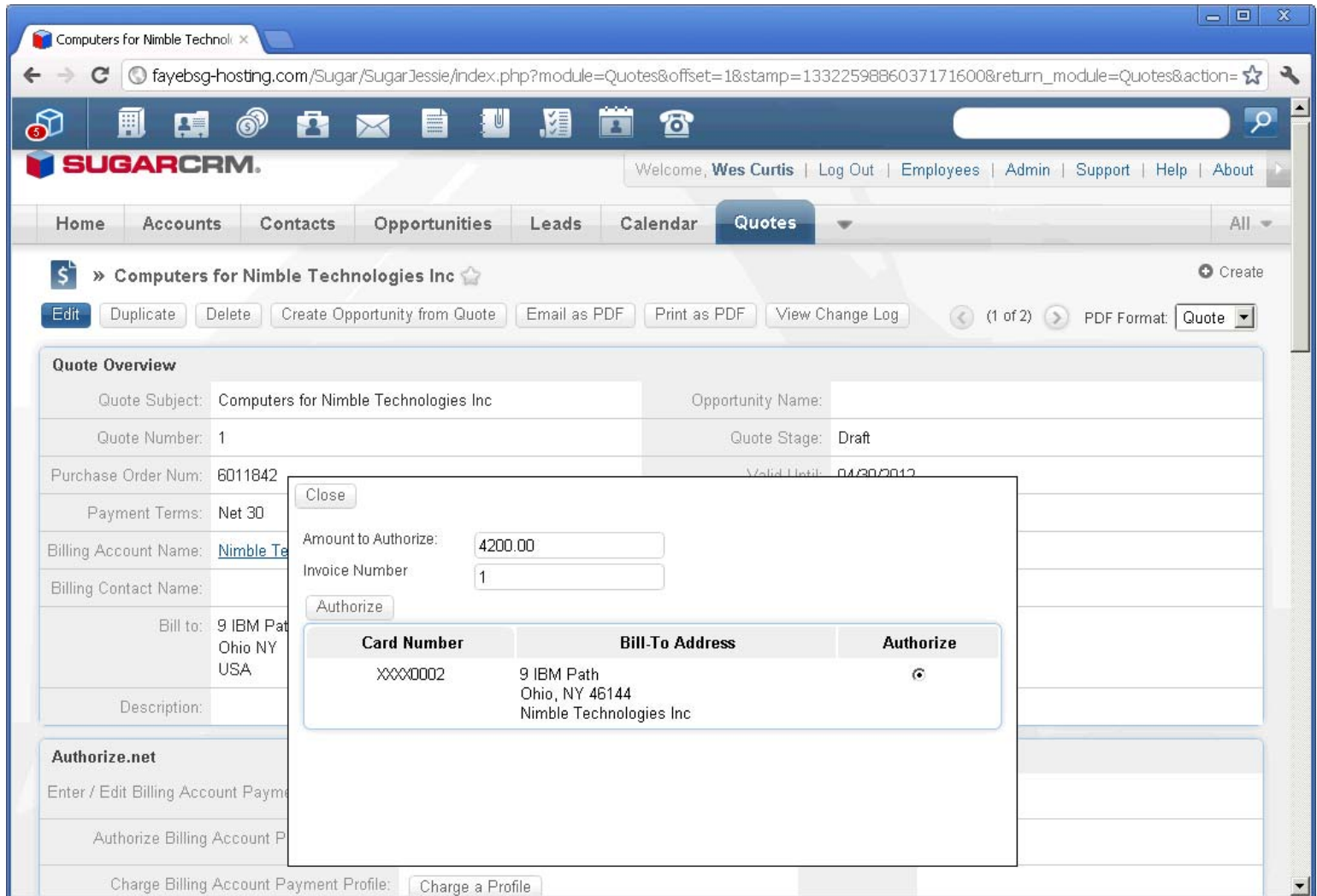
- Quote Subject:** Computers for Nimble Technologies
- Quote Number:** 1
- Purchase Order Num:** 6011842
- Payment Terms:** Net 30
- Billing Account Name:** [Nimble Technologies](#)
- Billing Contact Name:**
- Bill to:** 9 IBM Path
Ohio NY 46144
USA
- Description:**

The interface also includes a navigation bar with links like Home, Accounts, and Contacts, and a sidebar with a 'Quote Overview' section.

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

Authorizing a Credit Card

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



Computers for Nimble Technologies Inc

fayebsg-hosting.com/Sugar/SugarJessie/index.php?module=Quotes&offset=1&stamp=1332259886037171600&return_module=Quotes&action=

SUGARCRM. Welcome, **Wes Curtis** | Log Out | Employees | Admin | Support | Help | About

Home Accounts Contacts Opportunities Leads Calendar **Quotes** All

» Computers for Nimble Technologies Inc Create

Edit Duplicate Delete Create Opportunity from Quote Email as PDF Print as PDF View Change Log (1 of 2) PDF Format: Quote

Quote Overview

Quote Subject:	Computers for Nimble Technologies Inc	Opportunity Name:	
Quote Number:	1	Quote Stage:	Draft
Purchase Order Num:	6011842	Valid Until:	04/30/2012
Payment Terms:	Net 30		
Billing Account Name:	Nimble Te		
Billing Contact Name:			
Bill to:	9 IBM Pat Ohio NY USA		
Description:			

Authorize.net

Enter / Edit Billing Account Payment Profile

Authorize Billing Account Payment Profile

Charge Billing Account Payment Profile: Charge a Profile

Close

Amount to Authorize: 4200.00

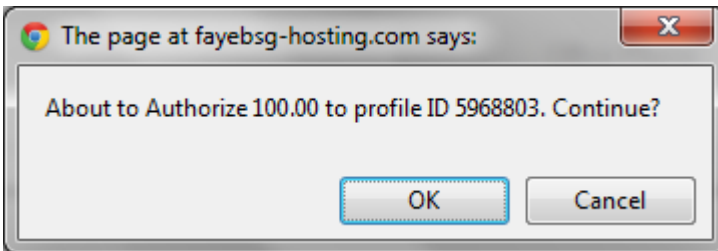
Invoice Number: 1

Authorize

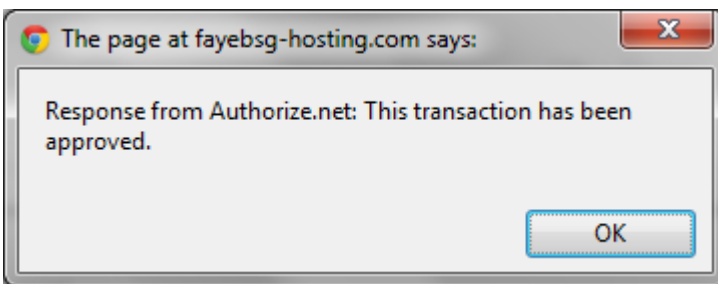
Card Number	Bill-To Address	Authorize
XXXX0002	9 IBM Path Ohio, NY 46144 Nimble Technologies Inc	<input type="radio"/>

- All credit cards on file for this account will be listed. Click the **Authorize** radio button for the one you wish to select.
- Type the dollar amount to authorize. Note the amount defaults to the total amount of the quote.
- Type a related reference number if needed.
- Click **Authorize**.

Authorizing a Credit Card (continued)



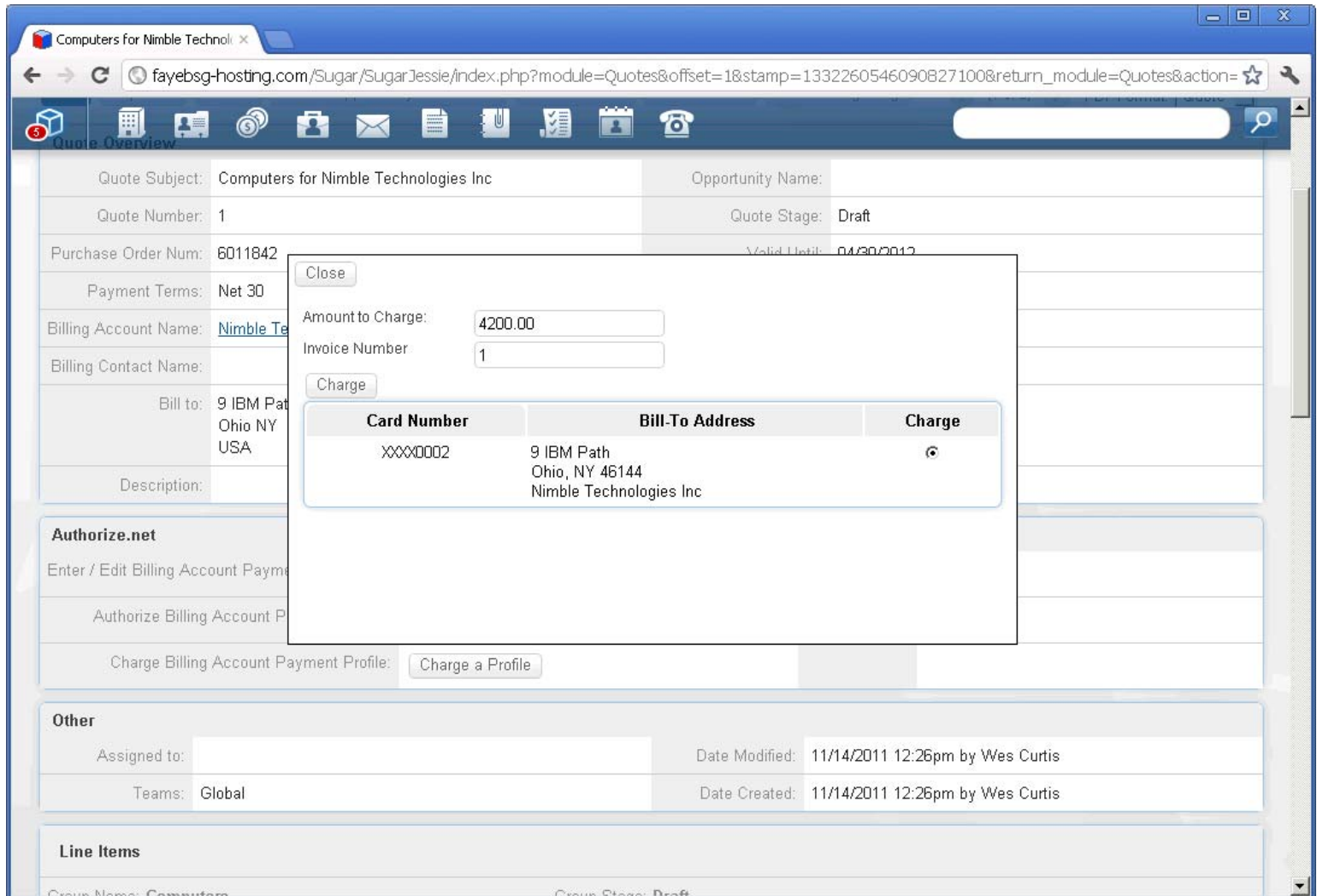
9. Click **OK** to proceed with authorizing the amount indicated.



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*.



Computers for Nimble Technologies Inc

Quote Subject: Computers for Nimble Technologies Inc

Quote Number: 1

Purchase Order Num: 6011842

Payment Terms: Net 30

Billing Account Name: Nimble Te

Billing Contact Name:

Bill to: 9 IBM Pat
Ohio NY
USA

Description:

Opportunity Name:

Quote Stage: Draft

Valid Until: 04/30/2012

Amount to Charge: 4200.00

Invoice Number: 1

Charge

Card Number	Bill-To Address	Charge
XXXX0002	9 IBM Path Ohio, NY 46144 Nimble Technologies Inc	<input checked="" type="radio"/>

Close

Authorize.net

Enter / Edit Billing Account Payme

Authorize Billing Account P

Charge Billing Account Payment Profile: Charge a Profile

Other

Assigned to:

Teams: Global

Date Modified: 11/14/2011 12:26pm by Wes Curtis

Date Created: 11/14/2011 12:26pm by Wes Curtis

Line Items

Group Name: Computers

Group Stage: Draft

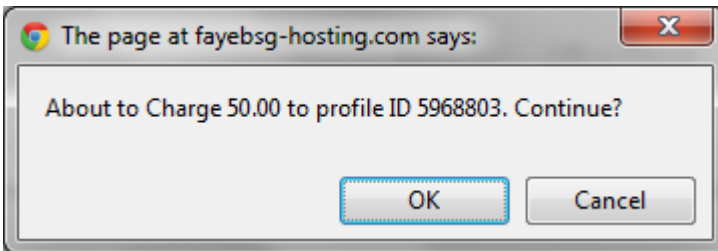
14. All credit cards on file for this account will be listed. Click the **Charge** radio button for the one you wish to select.

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

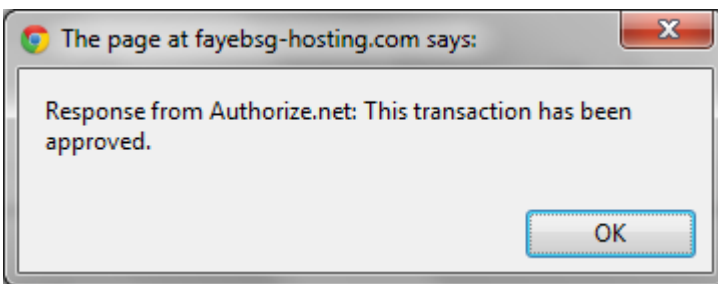
16. Type a related invoice or reference number if needed.

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

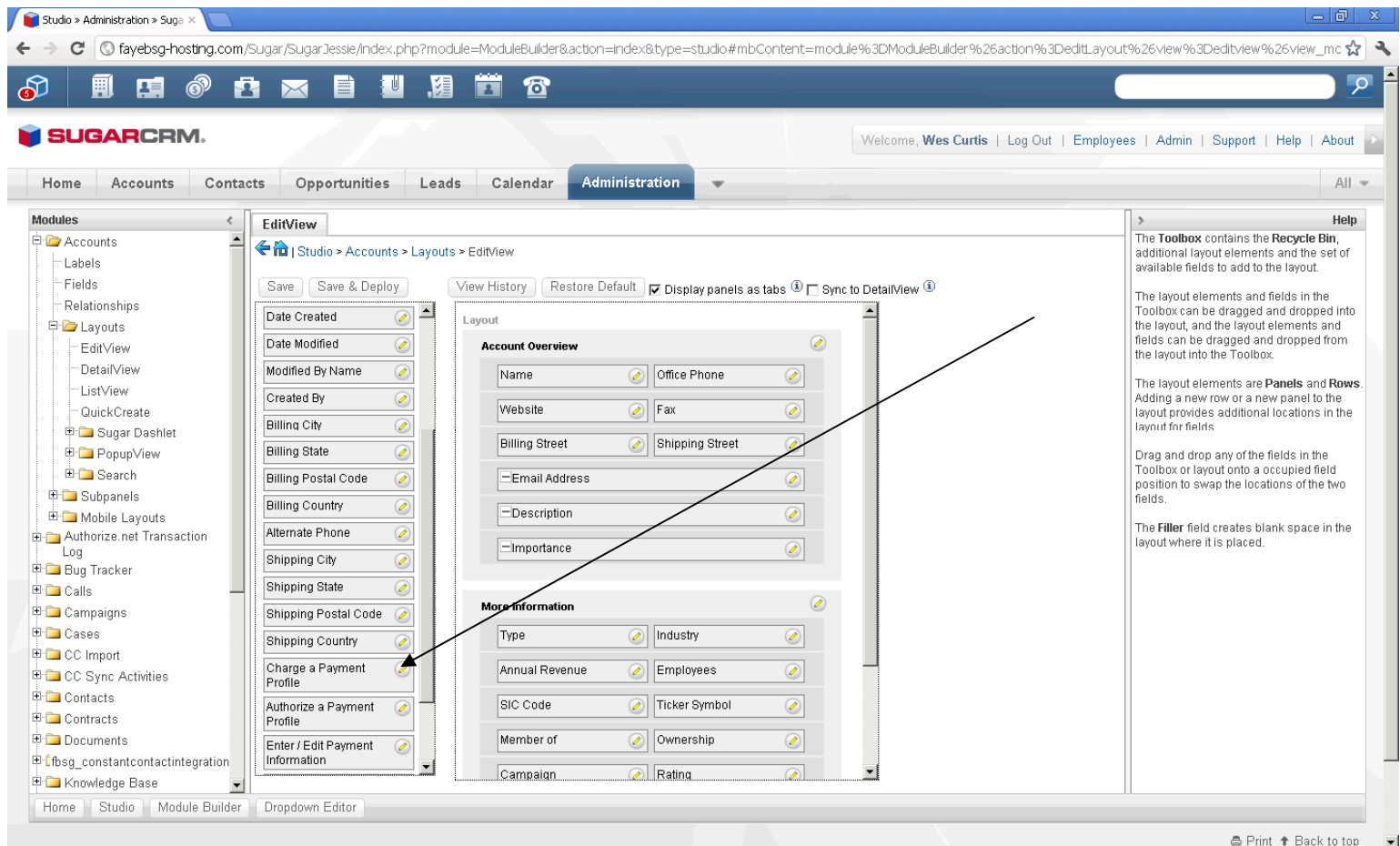
The design of our SugarCRM – Authorize.Net Integration provides users with the flexibility to place the integration functionality in a custom location of their choice (with some limitations). This is accomplished using the **Studio** module in Sugar.

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)

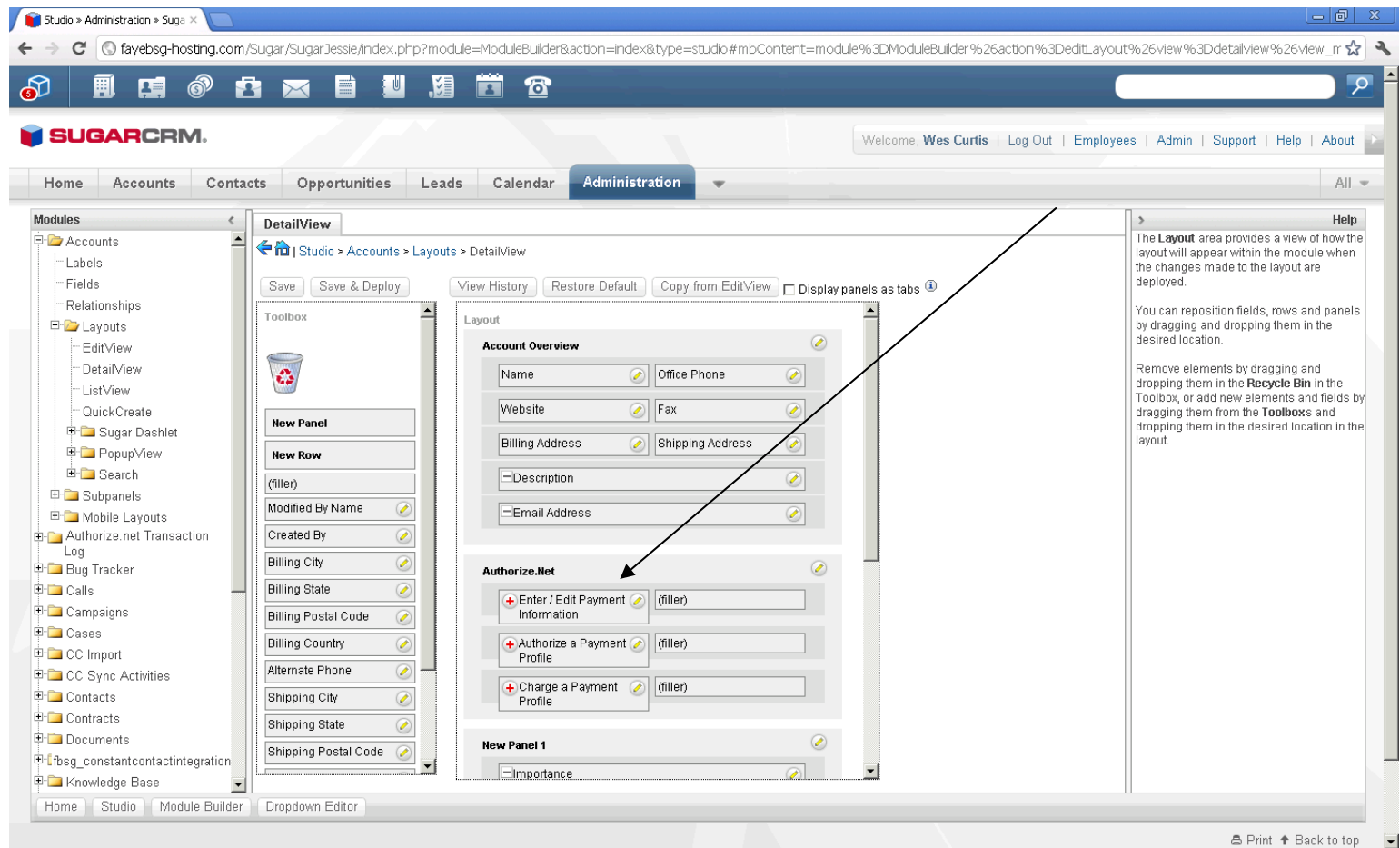
These fields have been automatically added to the ACCOUNTS, CONTACTS, and QUOTES modules. You now have the ability to add them to any screen layout desired related to these modules by using the existing functionality of the **Studio** module.

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:



The screenshot shows the SugarCRM Studio interface for editing the layout of the 'Account Overview' screen. The left sidebar contains a tree view of modules and layouts. The central workspace shows the 'Layout' editor with a 'Toolbox' on the left and a 'Layout' area on the right. The 'Layout' area contains sections for 'Account Overview' and 'Authorize.Net'. The 'Authorize.Net' section contains three buttons: 'Enter / Edit Payment Information', 'Authorize a Payment Profile', and 'Charge a Payment Profile'. The right-hand help panel provides instructions on how to use the layout editor, including how to reposition fields, rows, and panels, and how to add new elements and fields.

Help

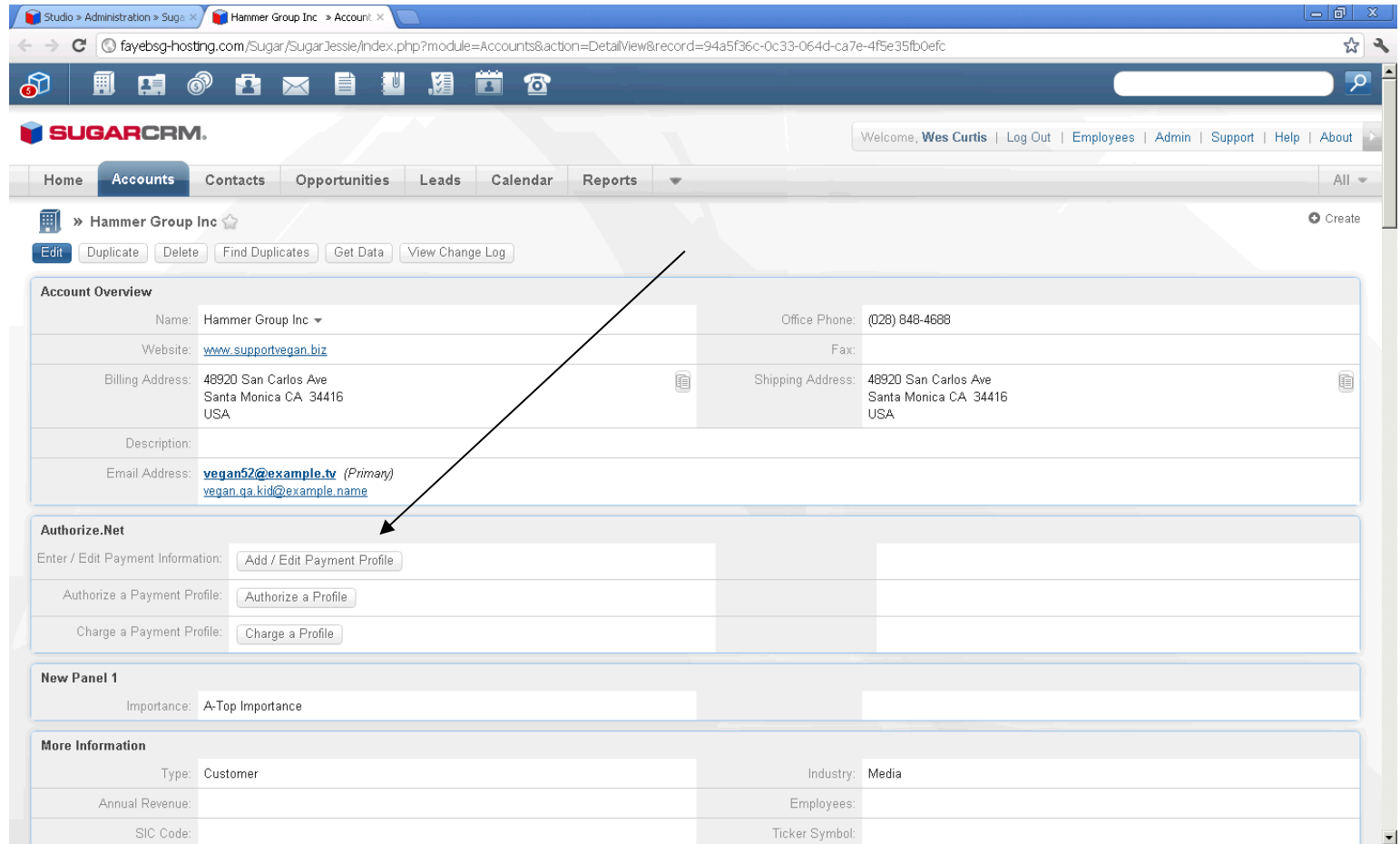
The **Layout** area provides a view of how the layout will appear within the module when the changes made to the layout are deployed.

You can reposition fields, rows and panels by dragging and dropping them in the desired location.

Remove elements by dragging and dropping them in the **Recycle Bin** in the Toolbox, or add new elements and fields by dragging them from the **Toolboxes** and dropping them in the desired location in the layout.

Adding the Authorize.Net Buttons to Screens (continued)

Note how the fields look on the actual screen:



The screenshot shows the SugarCRM interface for the account 'Hammer Group Inc'. The 'Account Overview' section displays the following information:

- Name: Hammer Group Inc
- Website: www.supportvegan.biz
- Billing Address: 48920 San Carlos Ave, Santa Monica CA 34416 USA
- Shipping Address: 48920 San Carlos Ave, Santa Monica CA 34416 USA
- Description:
- Email Address: vegan52@example.tv (Primary), vegan.qa.kid@example.name
- Office Phone: (028) 848-4688
- Fax:

The 'Authorize.Net' section contains the following buttons:

- Enter / Edit Payment Information: [Add / Edit Payment Profile](#)
- Authorize a Payment Profile: [Authorize a Profile](#)
- Charge a Payment Profile: [Charge a Profile](#)

The 'New Panel 1' section shows:

- Importance: A-Top Importance

The 'More Information' section displays:

- Type: Customer
- Industry: Media
- Annual Revenue:
- Employees:
- SIC Code:
- Ticker Symbol: