CRM Charge

For Microsoft Dynamics 365 Sales & Customer Service

User Guide

October 2021

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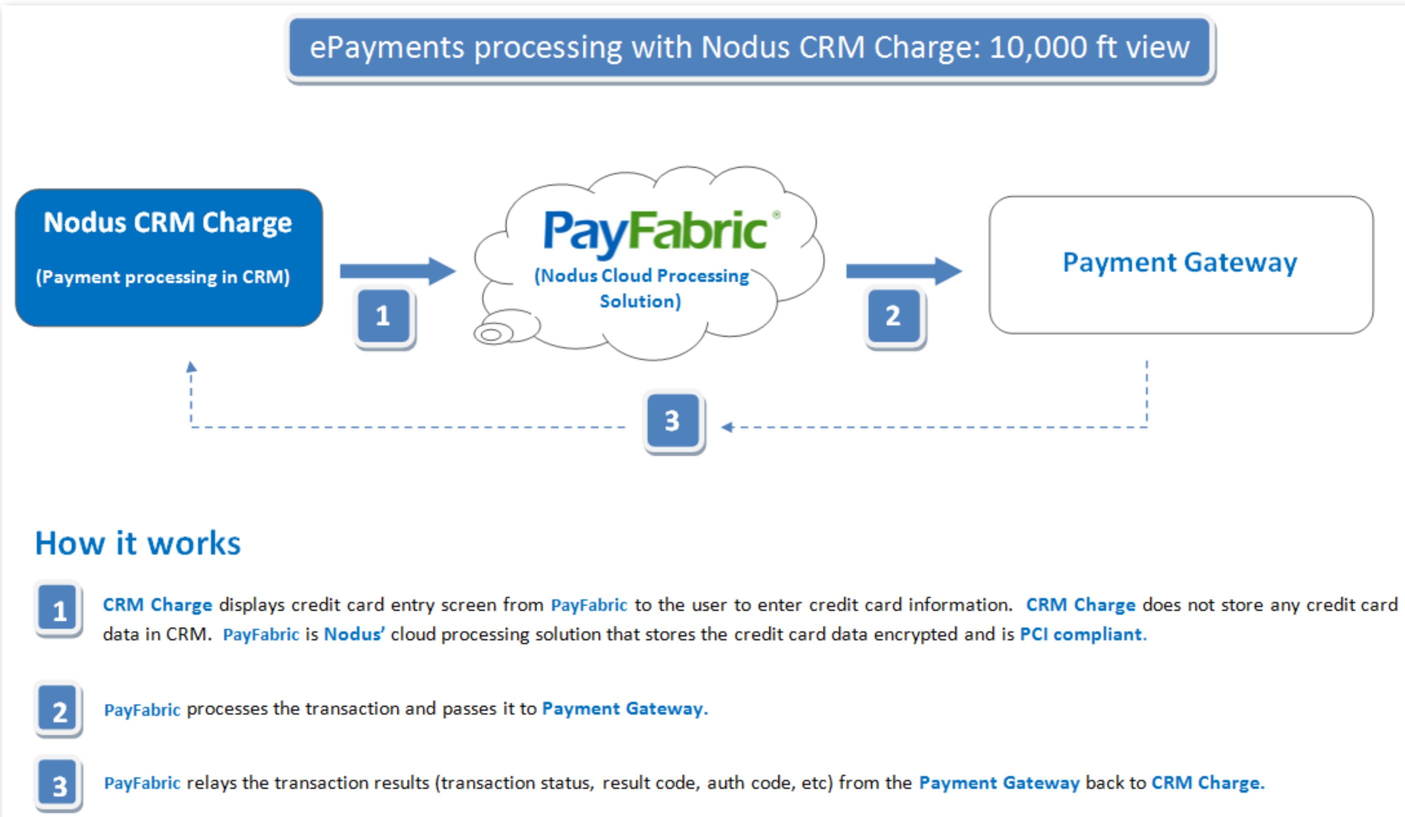
Introduction

CRM Charge® is a plug-and-play solution that allows Dynamics 365 Sales & Customer Service users to process ePayments directly within the environment. CRM Charge is a managed solution that leverages PayFabric®, a cloud-based payment acceptance platform, for secure credit card and/or ACH transaction processing.

CRM Charge can process ePayments against native and/or custom entities. ePayments can be processed individually in real-time mode or saved to a batch for efficient bulk processing at later time.



Installation

The CRM Charge application can be installed onto Microsoft Dynamics 365 Sales & Customer Service directly from the Microsoft Appsource Marketplace.

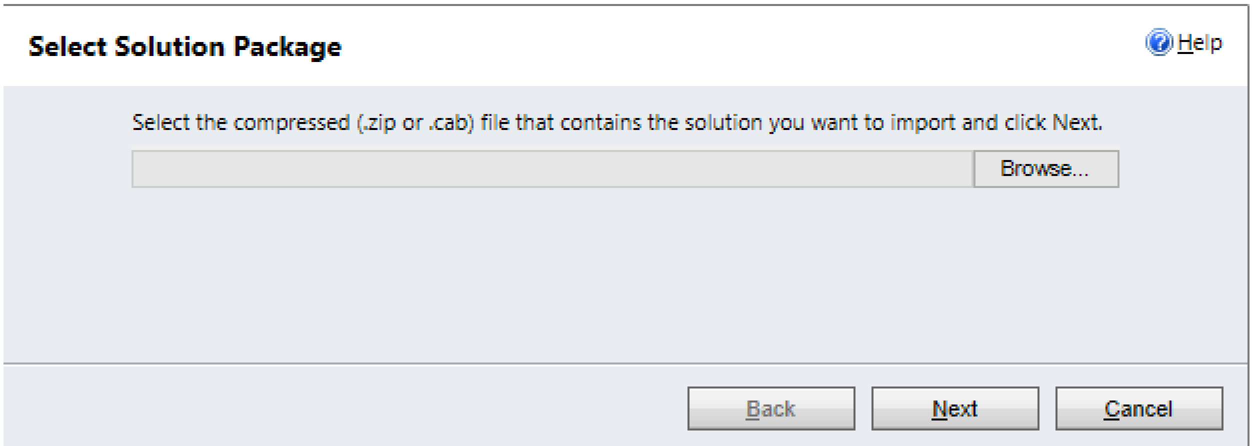
Import Solution

The CRM Charge application package can be manually imported onto Microsoft Dynamics 365 Sales & Customer Service.

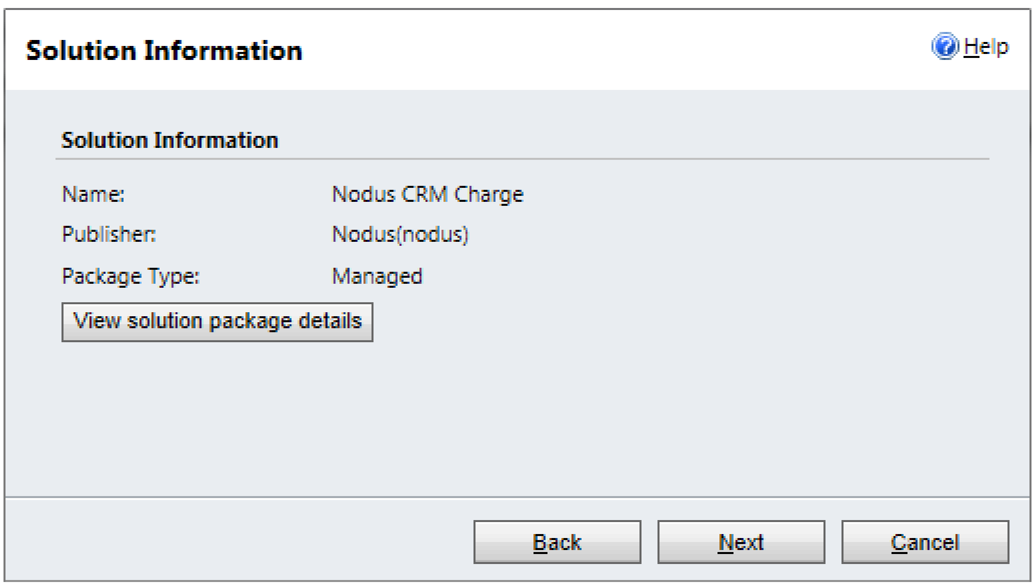
Steps:

1. Navigate to Settings > Solutions.

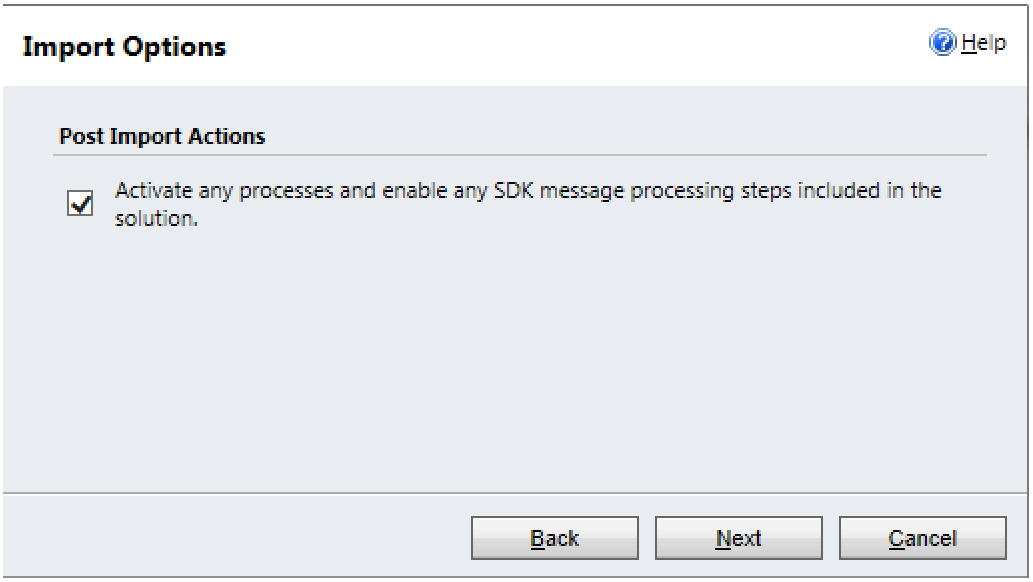
2. Click **import and browse** to CRM Charge managed solution NodusePayments_xxxxx.zip file.
3. Click **next** to begin the import process.



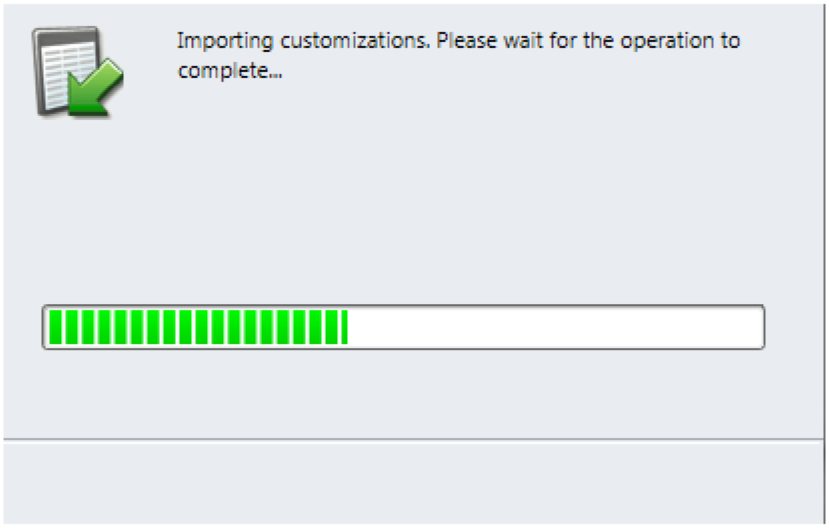
4. The prompt below displays the solution package details. Click **next.**



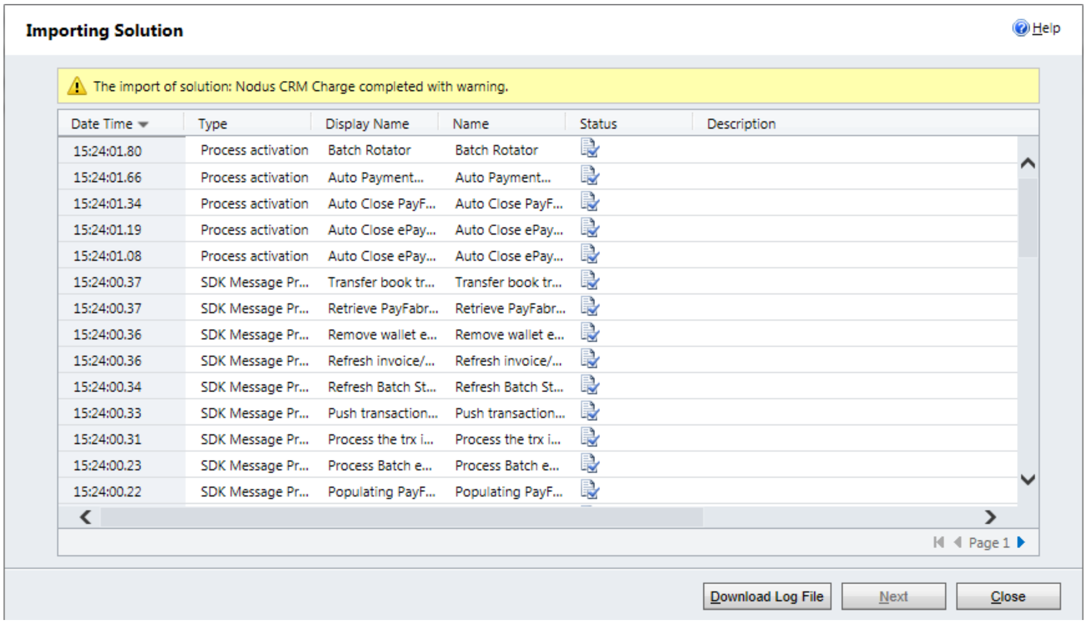
5. Make sure the checkmark is enabled under post import actions. Click **Next.**



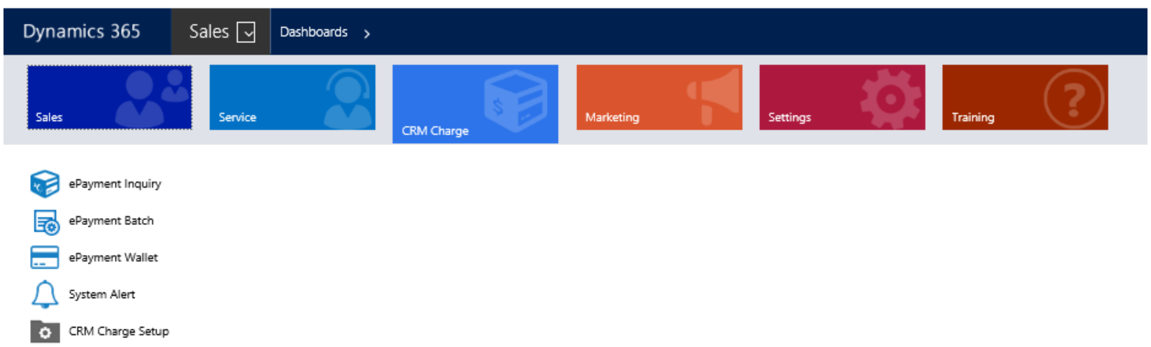
6. You will see the progress bar moving during the solution import.
7. Once the solution import is successful, you will see a "The import of solution: Nodus CRM Charge completed with warning" message.



8. Click **Close** to complete the solution import process.



9. Refresh your browser; you should see **CRM Charge** as a separate tab in your CRM as below.



User Permissions

The following default user permissions are available once the application is installed.

Important: Permissions must be assigned to continue with the license registration, application setup and usage of the Extension.

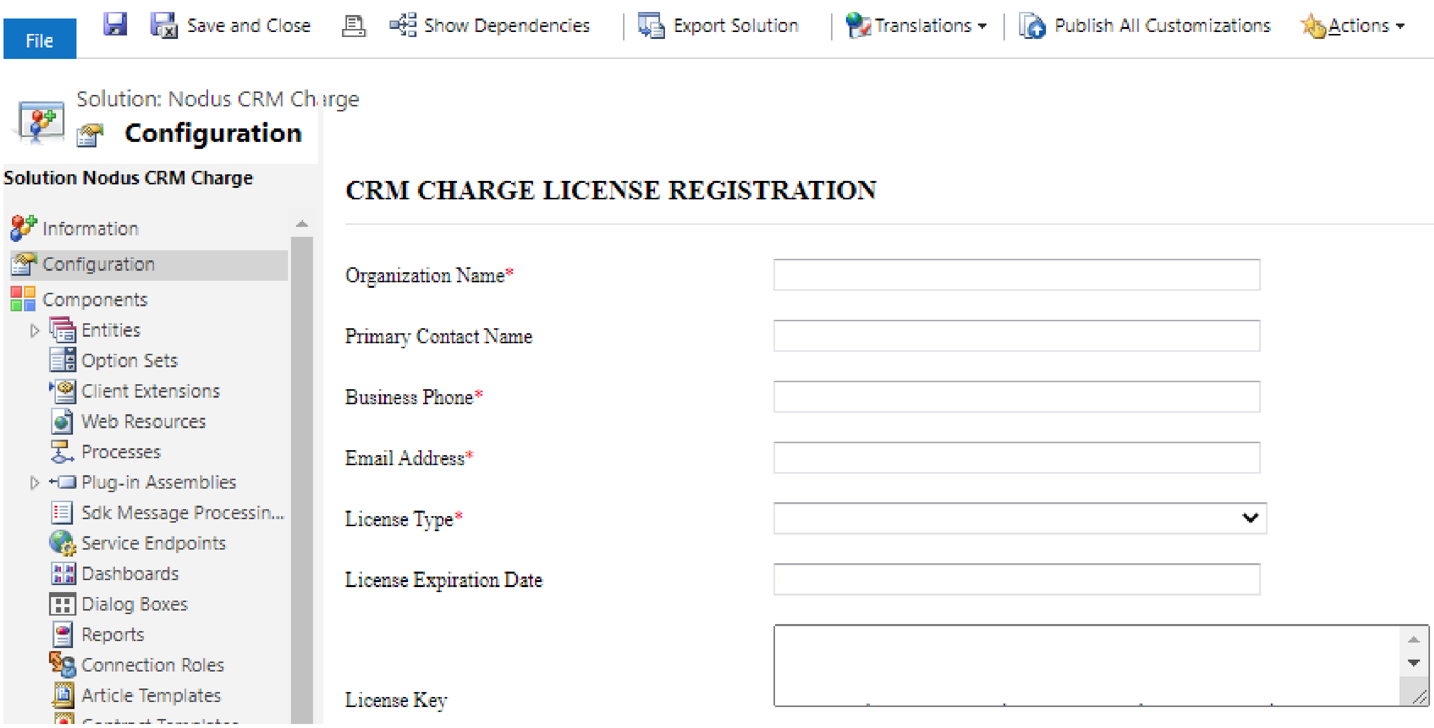
User Roles	Access
Nodus – ePayment Administrator	Full permission access to all available functionality in the following customer pages • System Alert • Processing History • PayFabric Transaction Key • Nodus Payment Field • License Key • Gateway

	• ePayment • ePayment Batch • ePayment Queue • ePayment Wallet • CRM Charge Setup • CRM Charge Setup Trigger
Nodus – ePayment Processor	Partial permission access to the PayFabric functionality in the following custom pages • System Alert • Processing History • PayFabric Transaction Key • Nodus Payment Field • License Key • Gateway • ePayment • ePayment Batch • ePayment Queue • ePayment Wallet • CRM Charge Setup • CRM Charge Setup Trigger

License Key Registration

In order to register the license for CRM Charge, go to the **Settings** > **Customization** > **Solution** > **NodusCRMCharge**.

Click the **Configuration** on the left navigation tab.



Field	Description
Organization Name (required)	Provide the business/company name
Primary Contact Name	Provide the primary contact name
Business Phone (required)	Provide the primary contact's phone number
Email Address (required)	Provide the primary contact's email address
License Type (required)	Choose 'Trial' for 30-days trial period and click on 'Request for 30 Days Trial' button. Choose 'Full' for paid license of CRM Charge and click on 'Update License Key'
License Expiration Date	Trial - Will be automatically populate with an expiration date. Full – Will be automatically populate with 'INDEFINITE'.
License Key	Trial – Will be automatically populate with trial license key. Full – Will be automatically populate with full license key.

Support

For support related inquires or for questions not found within this document, contact Nodus Support for further assistance.

Contact Method	Address/Numbers
Email	support@nodus.com
Telephone	(909) 482-4701, dial 2 for Support
Website	http://www.nodus.com/customers/

Setup

PayFabric Account Setup

Setup a PayFabric Account

In order to use CRM Charge, merchant must setup a PayFabric account associated to an organization to take advantages of the processing service. Please visit the following pages to setup a brand new PayFabric account:

- **Live/Production:** Contact sales@payfabric.com
- **Test/Sandbox:** https://sandbox.payfabric.com/Portal/Account/Register

Create a Device

Once the PayFabric account is setup, an application device needs to be configured for CRM Charge in order to enable the application to be authenticated to connect to PayFabric service. Please following the steps below to setup a PayFabric device for CRM Charge:

1. Log into the PayFabric portal
2. From the left menu, navigate to **Settings** > **Dev Central**
3. On the 'DEV Central' page, select the **Themes** tab
4. Click the '**Create New +**' button and enter a name for the theme such as 'CRM Charge'.
5. Click the below link to obtain the JS code for the CRM Charge Theme.

https://github.com/PayFabric/Themes/tree/master/CRMCharge

6. Copy all the text from the page
7. Browse back to the PayFabric page and paste the copied text into the '**Custom.js**' field
8. Click the **Save** button to save the changes to the theme
9. After the save is complete, select the **Device Management** tab
10. Click the **Generate** button to present the fields for creating a Device
11. Populate the **Device Name** field with a name such as 'CRM Charge'.
12. Populate the **Password** and the **Confirm Password** fields with a secure password. Please take note of this password as it will be used again shortly.

13. Click the **Confirm** button to generate the device
14. Take note of the **Device ID** as it will be used shortly.
15. In the Device List, click the icon in the **Default Theme** column for the newly created device
16. Select the Theme name for the Theme that was created in the previous steps
17. Click the **Confirm** button to save changes.

PayLink Note: If there is a need to use PayLink feature with CRM Charge, continues to step 18.

18. Repeat steps 13 through 17 to create a device for PayLink processing. During step 14, use a name such as "PayLink" to refer to this PayLink Device.
19. In the upper left dropdown menu, change the dropdown to **PayLink**
20. A prompt should appear to enable the PayLink service. If unable to activate the PayLink service from this page, please contact sales@PayFabric.com or your PayFabric partner to enable the PayLink Service.
21. After the PayLink is enabled, the Settings page should be displayed to connect the PayLink device. Click the **Change** button, choose the PayLink device from the Device name menu and provide the associated password.
22. Click the **Save** button to apply the changes.

Setup a Gateway Account Profile

In order to process transactions, a Gateway Account Profile should be setup in the PayFabric account. The page for setting up a Gateway Account Profile can be found in the menu under **Settings → Gateway Account Profiles.**

For more information on setup of the Gateway Account Profile and using PayFabric in general, please see the PayFabric Portal Guide.

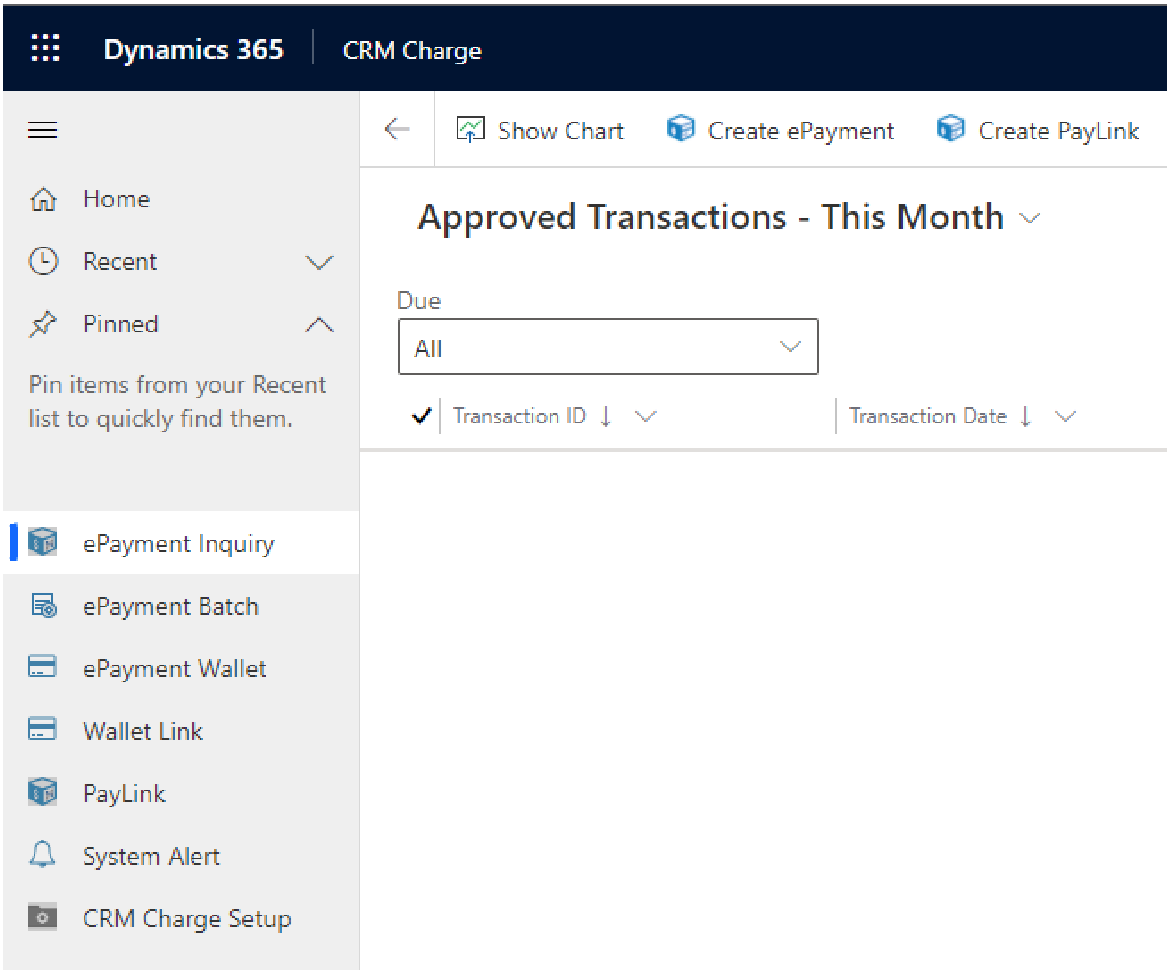
https://www.nodus.com/documentation/PayFabric-User-Guide.pdf

CRM Charge Hub

Upon completion of the installation, below are the menu options that user will be able to access for CRM Charge within Dynamics 365:

- CRM Charge Setup – This is where merchant user can setup and configure all the transactional/feature settings related to CRM Charge.
- ePayment Inquiry - This is where merchant user can access and view all the payment transactions created by CRM Charge or generate a new one.
- ePayment Batch - This is where merchant user can access the batch processing feature within CRM Charge in order to process ePayment transaction in bulk.
- ePayment Wallet - This is where merchant user can access and view all the ePayment wallet records created by CRM Charge for future use.
- Wallet Link - This is where merchant user can access and view all the wallet links created by CRM Charge or to generate a new wallet link to be sent to a customer.
- PayLink - This is where merchant user can access and view all the payment links created by CRM Charge or to generate a new payment link to be sent to a customer.

- System Alert - This is where merchant user can access and view all the alerts generated by CRM Charge application in order to take proper action.



CRM Charge Setup

The following process will configure the connection to PayFabric

1. From **CRM Charge** Hub > Navigate to the **CRM Charge Configuration** page using the **CRM Charge Setup** menu in the left navigation.
2. Populate the fields referencing the below table.

Tab	Field	Description
Setup	Name	Specify a description for the configuration. (i.e.: CRM Charge)
	PayFabric Connection Settings	

	Web URL	This field requires the URL of the PayFabric hosted payment page in order for CRM Charge to connect to. **Sandbox:** sandbox.payfabric.com/Payment/Web **Live:** www.payfabric.com/Payment/Web
	API URL	This field requires the URL of the PayFabric API endpoint in order for CRM Charge to connect to. **Sandbox:** sandbox.payfabric.com/Payment **Live:** www.payfabric.com/Payment
	Device ID	Set this value to the PayFabric Device ID created for CRM Charge during the previous Create a Device section
	Device Password	Set this value to the password associated to the PayFabric Device ID for CRM Charge
	Default Gateway	Provide user the ability to assign a default gateway profile for credit card processing. This processing platform will be pre-selected when ePayment page is loaded.
	Default Transaction Type	Provide user the ability to assign a default transaction type for credit card processing. This transaction type will be pre-selected when ePayment page is loaded.
PayLink Setup		
	PayLink URL	This field requires the URL of the PayLink API endpoint in order for CRM Charge to connect to. **Sandbox:** sandbox.payfabric.com/Paylink **Live:** www.payfabric.com/Paylink
	Device ID	Set this value to the PayLink Device ID on PayFabric during the previous Create a Device section
	Device Password	Set this value to the password associated to the PayLink Device ID on PayFabric.
	Default Credit Card Gateway	Provide user the ability to assign a default gateway profile for credit card processing. This processing platform will be pre-selected when loading PayLink page.

	Default eCheck Gateway	Provide user the ability to assign a default gateway profile for eCheck/ACH processing. This processing platform will be pre-selected when loading PayLink page.
	Default Transaction Type	Provide user the ability to assign a default transaction type for PayLink processing. This transaction type will be pre-selected when loading PayLink page.
Transaction Settings	Settlement Time	This time should be set to the time to match up with the settlement time of the payment gateway. This value is used to determine if a Void or Refund transaction should be processed in the event of a Reversal.
	Surcharge Name	Item to be added to transactions processed against open Sales Orders and Sales Invoices that include a surcharge. With this setting configured, the selected item will automatically be added to the Sales Order or Sales Invoice after the transaction is successfully processed with a credit card surcharge included.
	PayLink Default Transaction Type	Select the default transaction type to be used for PayLink transactions
	Allow Overpayment	Select 'Yes' to allow overpayment against CRM Charge transaction, other set the value to 'No'.
	Failed Batch Prefix	For any failed processing transactions, they will be placed into a rejected/declined batch with the specified prefix from CRM Charge setup.
	Denied Batch Prefix	For any declined transactions, they will be placed into a rejected/denied batch with the specified prefix from CRM Charge setup.
	Merchant ID	Specify the EVO Merchant ID
	Owing Organization Unit	Specify the business unit associated with the CRM Charge application.

Data Configuration	Customer ID Field Name	Populate the Dynamics 365 field schema name for the assigned 'Account ID' field name based on the setup within Dynamics 365. CRM Charge will use this field as the Customer ID for the corresponding ePayment transaction. By default, this field is left blank whereas CRM Charge will utilize the Account ID's unique identifier as the Customer ID for the transaction.
	Contact ID Field Name	Populate the Dynamics 365 field schema name for the assigned 'Contact ID' field name based on the setup within Dynamics 365. CRM Charge will use this field as the Customer ID for the corresponding ePayment transaction. By default, this field is left blank whereas CRM Charge will utilize the Contact ID's unique identifier as the Customer ID for the transaction.
Receipt Template	Provides merchant the ability to customize the CRM Charge's sales receipt template.	
Related		
Audit History	Delete Change History	Remove all the change history log
Gateway	New Gateway	Ability to add a related gateway profile as part of CRM Charge Setup record in order to support surcharge. See Surcharge section for more details.

Features

Transaction Processing

CRM Charge can process ePayments against the following native Dynamics 365 Sales & Customer Service entities.

- Account
- Contact
- Opportunity

- Lead
- Case
- Quote
- Sales Order
- Invoice
- Entitlement

There are various types of transactions that can be processed via CRM Charge application.

Types	Description
Sale	An approved Sale is an immediate charge to the customer's credit card or account. If a Sale is saved to a batch, the charge will not occur until the batch is processed successfully. A Sale can be reversed with a Void or Credit.
Authorization	An approved Authorization reserves a specified amount on the customer's credit card or account. It prevents the customer from using that portion of their credit/funds; however, it does not actually charge the card no transfer any money. The number of days an authorization transaction will stay open is determined by each cardholder's issuing bank. The most common duration for Book is seven to ten days, but some banks may hold Books for as long as four weeks and as little as three days. An authorization transaction can be voided in CRM Charge and it will release the reservation of the fund on the credit card.
Capture	A Capture is the second part of the authorization transaction to capture the reserved fund. Thus, processing a capture transaction results in an immediate charge to the customer's credit card or account. Similar to a Sale, a capture transaction can be reversed by issuing a credit or void.

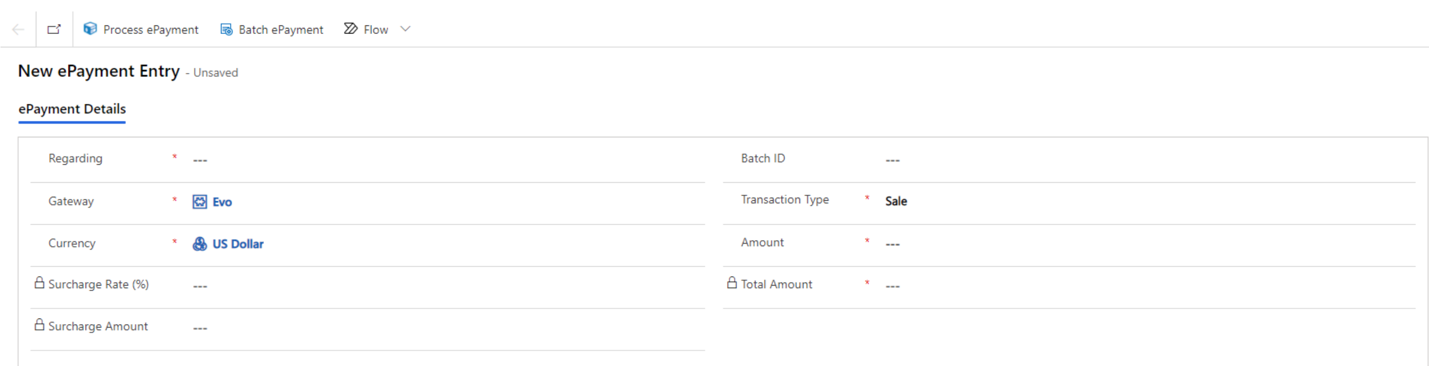
Refund	A Refund is issued to credit back to the customer's account or credit card. User will not be able to void a settled Refund transaction from CRM Charge.
Force	A Force is a form of voice authorization transaction where an authorization code was obtained to be used to complete a credit card transaction.
Local Force	Local Force transaction is used when the transaction had already been processed outside of Dynamics 365 or CRM Charge has no record of the transaction. Local force enables user to record a transaction for audit or record keeping purpose. Please note that local force transactions are not processed through the payment gateway platform (ie: PayFabric) or processor.
Cash/Check	This method is used for entering payments made via cash or check. Please note that 'Cash/Check' payments are not processed through the payment gateway platform (ie: PayFabric) or processor.

ePayment Inquiry

This is where merchant user can access and view all the payment transactions created by CRM Charge or generate a new one.

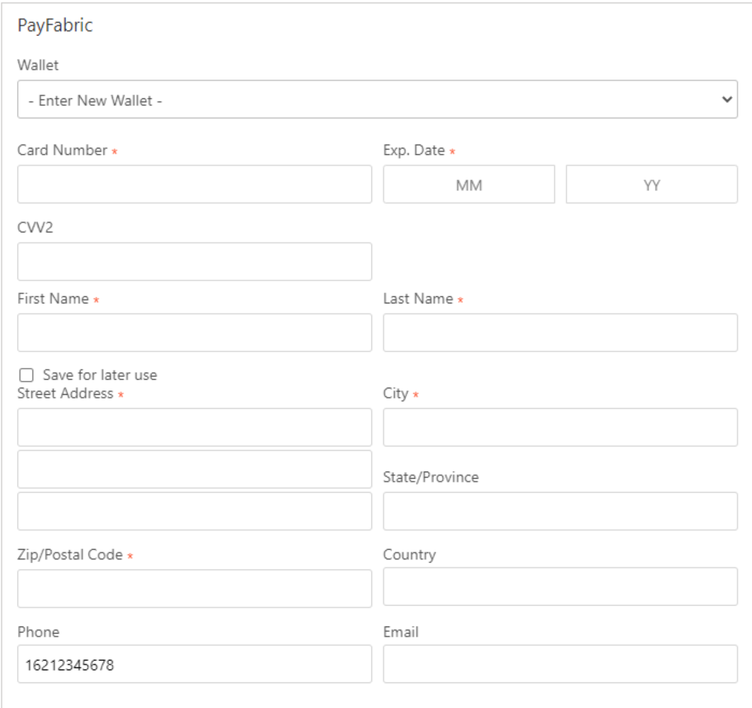
Create a New ePayment Entry

1. Click on Create ePayment button from the top navigation ribbon.
2. Populate the ePayment Details to create a new ePayment Entry.



Field(s)	Required?	Description
Regarding	Yes	Associate a [supported] entity type to the ePayment Entry for the to-be-processed transaction.
Gateway	Yes	Determine which payment method you would like to use to receive the payment from a customer and choose an associated payment gateway to be used to process the transaction.
Currency	Yes	The currency you accept for the payment.
Batch ID	No	Desired batch name you would like to associate the transaction with for later bulk processing. (ie: RecurringSales, JanSubscription, etc.)
Transaction Type	Yes	Type of transaction for the ePayment Entry
Amount	Yes	Amount of the transaction to be processed
Surcharge Rate (%)	No	The surcharge rate, predefined in the gateway profile setup
Surcharge Amount	No	The calculated surcharge amount of the transaction based on the surcharge rate. This will be automatically calculated by CRM Charge.
Total Amount	Yes	The final total transaction amount including the surcharge, if applicable.

3. Once all the fields have been populated, PayFabric's hosed payment will get loaded to enable user to populate payment information.



4. Populate all the details for the payment information, [optional] check mark the box ‘Save for later use’ if desired to save the payment details for future use.
5. Click Process ePayment once read to process the transaction.
6. Once the transaction is successfully processed, user will receive the confirmation receipt page.

NODUS

SALES RECEIPT

Insert Company slogan here!

Date: 11/23/2021
TRANSACTION ID:
21112300792279

To FS_Acc
FS_Acc

,

Payment Method	CC/eCheck No.
CreditCard - Visa	XXXXXXXXXXXX1111

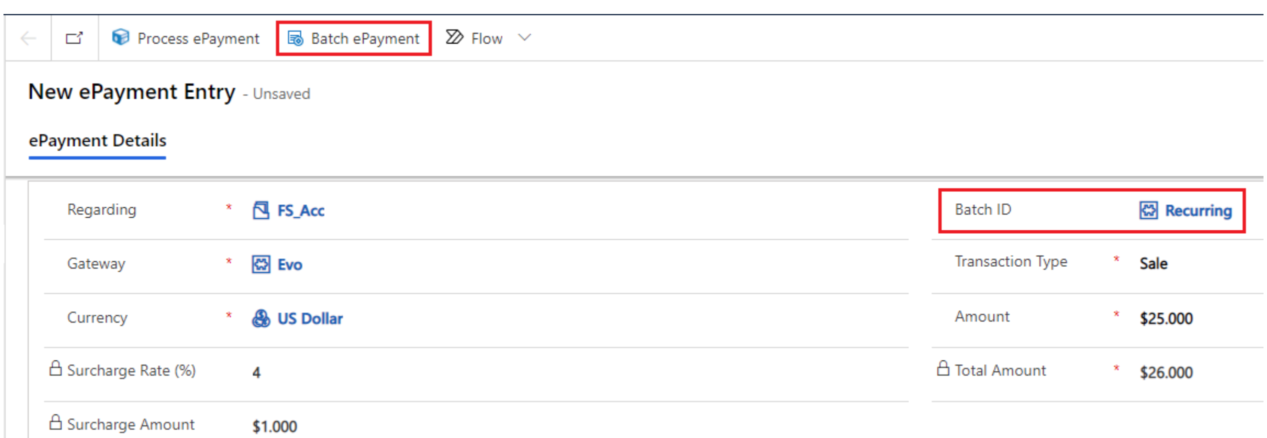
Sub Total	$20.000
Sales Tax	$0.00
Total	$20.000
Surcharge(4%)	$0.800
Payment	$20.000
Total Payment(s)	$0.00
Outstanding Balance	$0.00

Thank you for your business!

ePayment Batch

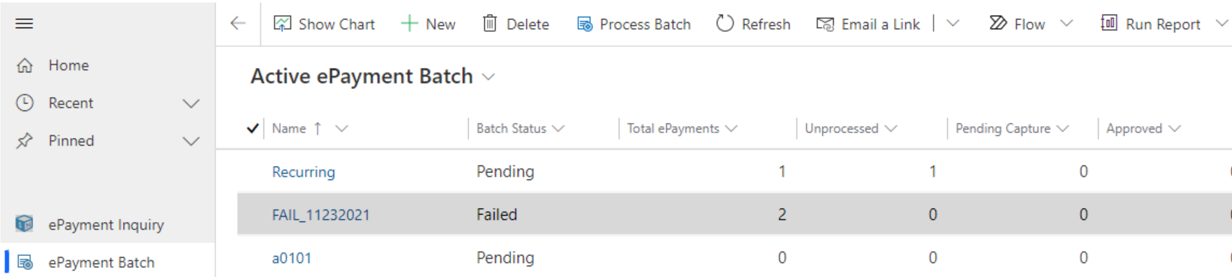
With CRM Charge, asides from processing individual transaction in real-time, user can also process the transactions in bulk via ePayment Batch.

If **Batch ID** field was populated during ePayment Entry creation, the transaction will be saved into a batch for later processing in bulk by choosing the Batch ePayment button from the top navigation ribbon.

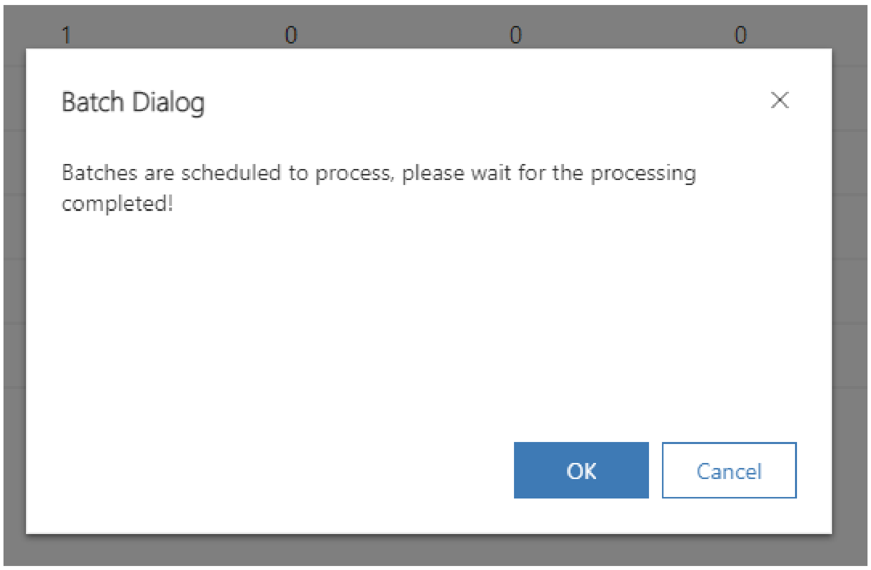


Processing Transaction in Bulk

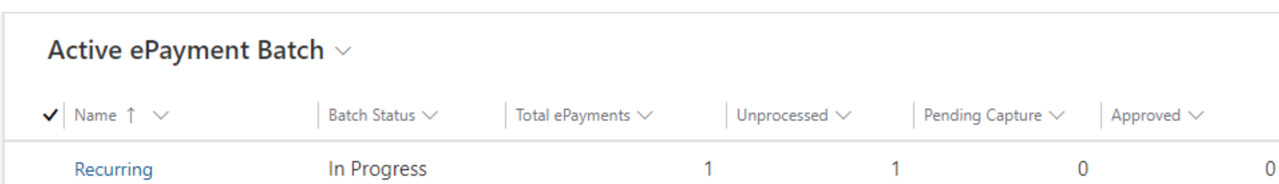
1. Under **ePayment Batch**, select the batch of transactions that was saved and ready to be processed.



2. Click Process Batch from the top navigation ribbon to process the selected batch.
3. Click OK to acknowledge that batch is getting ready for processing.



4. Batch Status is changed to 'In Progress'



5. As transaction is successfully processed from the batch, it will be listed and appeared under ePayment Inquiry grid.
6. Once all the transactions associated to the batch have been processed, the batch itself will be removed from **ePayment Batch** section.

Handling Declined Transaction in Bulk

1. For any declined transactions, they will be placed into a rejected/declined batch with the specified prefix from CRM Charge setup.

Active ePayment Batch

Name ↑	Batch Status	Total ePayments	Unprocessed	Pending Capture	Approved	Declined
FAIL_11232021	Failed	2	0	0	0	0

2. Click on the batch name to view and access individual declined transaction.
3. Each transaction can be updated for re-attempt for processing.

FAIL_11232021 - Saved
ePayment Batch

No — Is On Hold | Failed — Batch Status | --- — Process Time

General | Related

Batch ID *	FAIL_11232021	Comment	---
Total ePayments	2	Approved	0
Unprocessed	1	Declined	0
Error Message	---	Pending Capture	0
Failed	1	Batch Type	**Failed Batch**

ePayments — Process | Change Batch | New ePayment Entry

Transaction ID	Transaction Date ↓	Transaction Type	Payment Info	Regarding	Amount	PayFabric Status	Reference Status
21040800873724	4/7/2021	Sale	XXXXXXXXXXXX1111	FS_Acc	$1.000	Open	---
21040700873452	4/7/2021	Book	XXXXXXXXXXXX1111	InvoiceTest001	$2.000	Failed	---

ePayment Wallet

CRM Charge application does not store any payment information within Dynamics 365 Sales & Customer Service. It utilizes PayFabric's Wallet to store all sensitive information in the PayFabric platform.

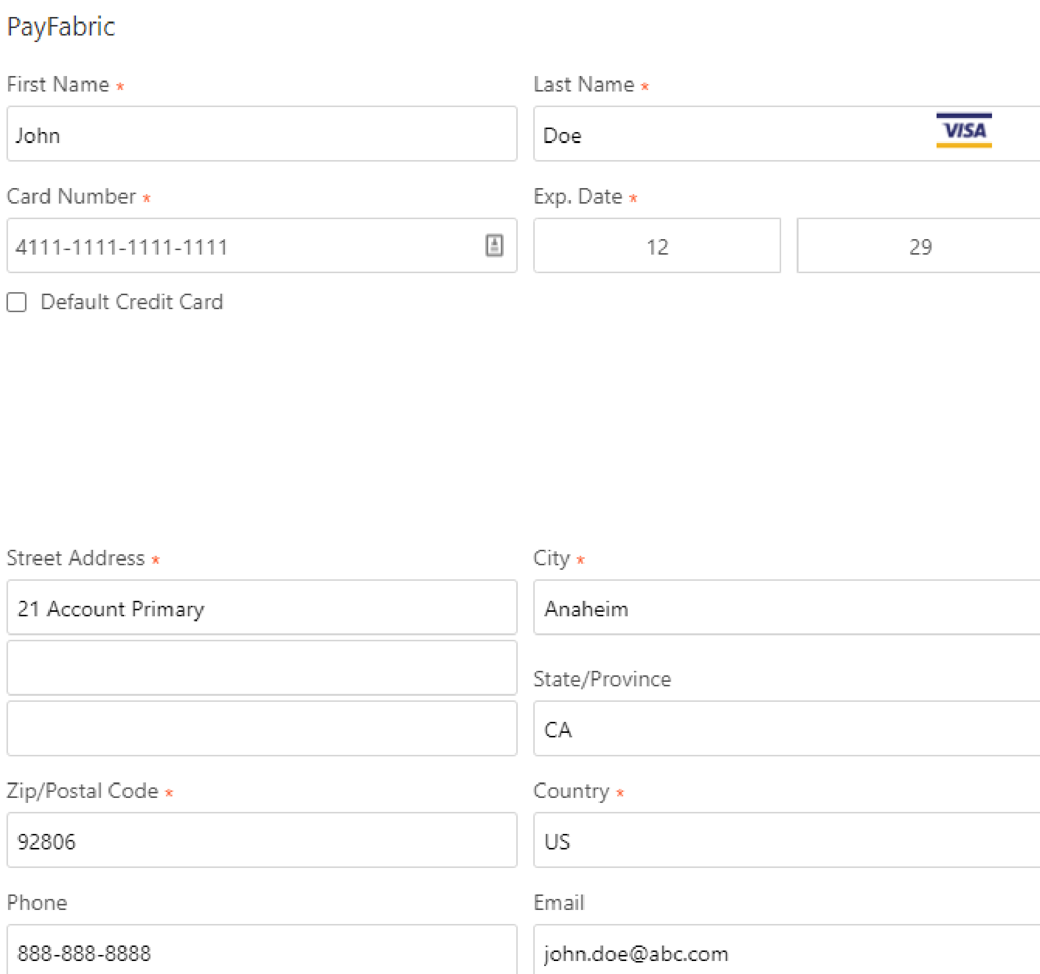
CRM Charge supports all the payment methods available under PayFabric platform: credit card and eCheck/ACH.

There are couple of ways to add a new wallet entry into CRM Charge ePayment Wallet for later or future use, either:

- Via ePayment Wallet
- Via Wallet Link

Add a new Wallet Entry via ePayment Wallet

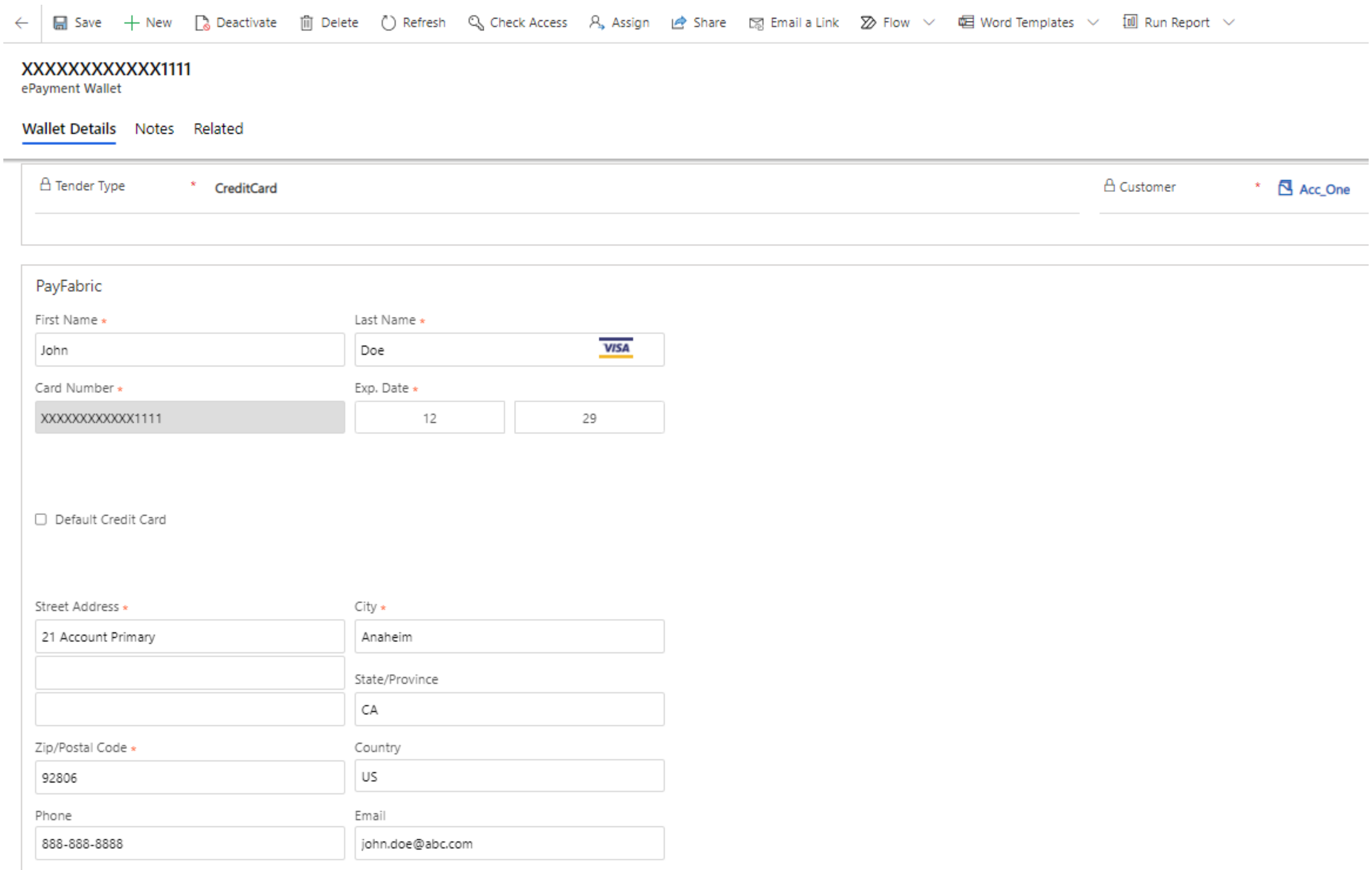
1. Navigate to **ePayment Wallet** within CRM Charge hub
2. Choose **New**
3. Under **Tender Type**, choose a value from the dropdown box of either 'Credit Card' or 'eCheck' (for ACH).
4. Under **Customer**, select a customer record using the lookup button to associate this new wallet entry to either an Account or a Contact.
5. Fill in the available information into the PayFabric's hosted form.



6. Select **Save & Close**.

Modify an existing Wallet Entry via ePayment Wallet

1. Navigate to **ePayment Wallet** within CRM Charge hub
2. Select an existing record to modify by double-clicking the desired record
3. Make changes to the necessary information
4. Select **Save**.



Delete an existing Wallet Entry via ePayment Wallet

1. Navigate to **ePayment Wallet** within CRM Charge hub
2. Select an existing record to modify by double-clicking the desired record
3. Select **Delete**.
4. Confirm to the prompt on whether to proceed with the deletion by selecting **Delete** or **Cancel**.

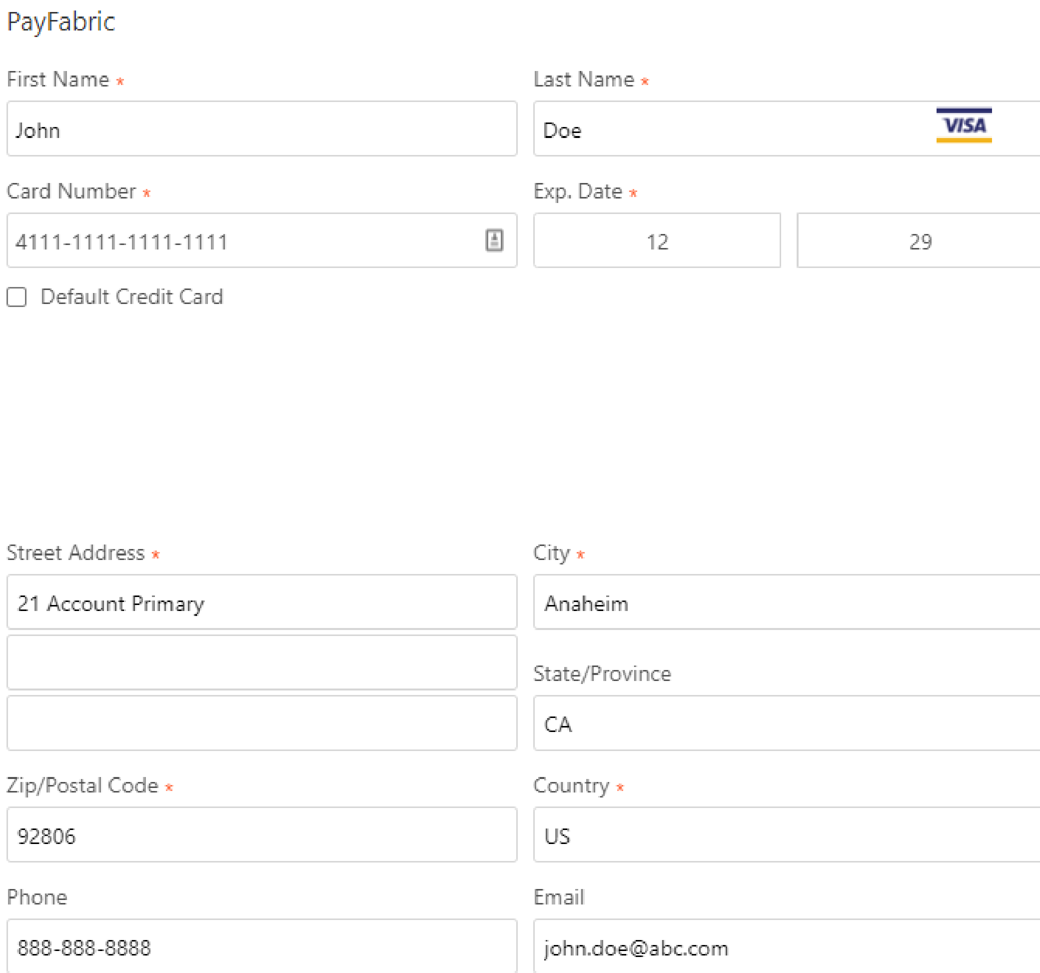
Wallet Link

Wallet Link feature provides merchant a secure method to collect payment information directly from their end-customer without having to handle sensitive card data.

Pre-requisite: Please make sure the PayLink device has been setup with PayFabric using the instruction here.

Generate Wallet Link

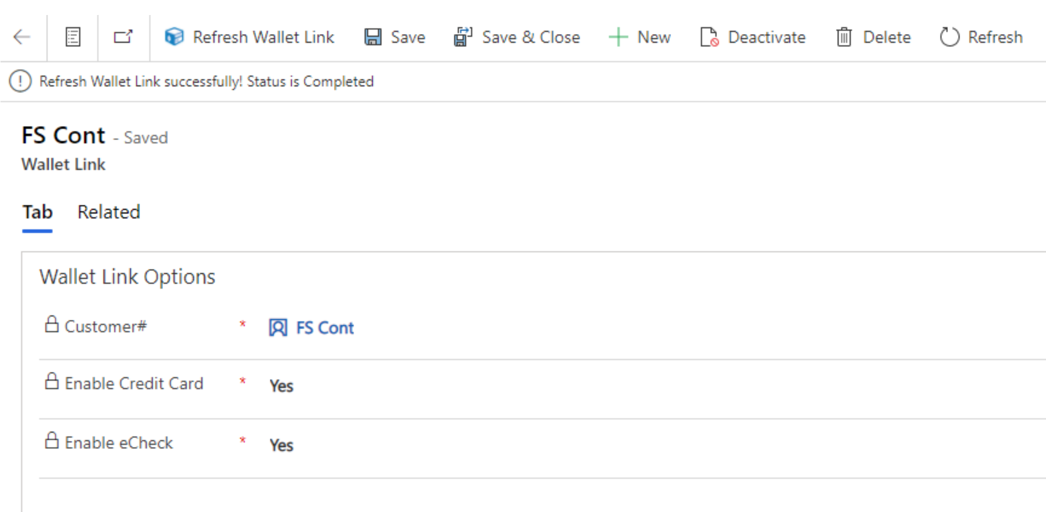
1. Navigate to **Wallet Link** within CRM Charge hub
2. Choose **New**
3. Under **Customer**, select a customer record using the lookup button to associate this new wallet entry to either an Account or a Contact.
4. Provide the customer the ability to complete a wallet link with ‘credit card’ or ‘eCheck’ by setting ‘Enable Credit Card’ or ‘Enable eCheck’ to Yes. If no, the customer will not be able to enter the payment information for that payment method.



5. Select **Save & Close**.

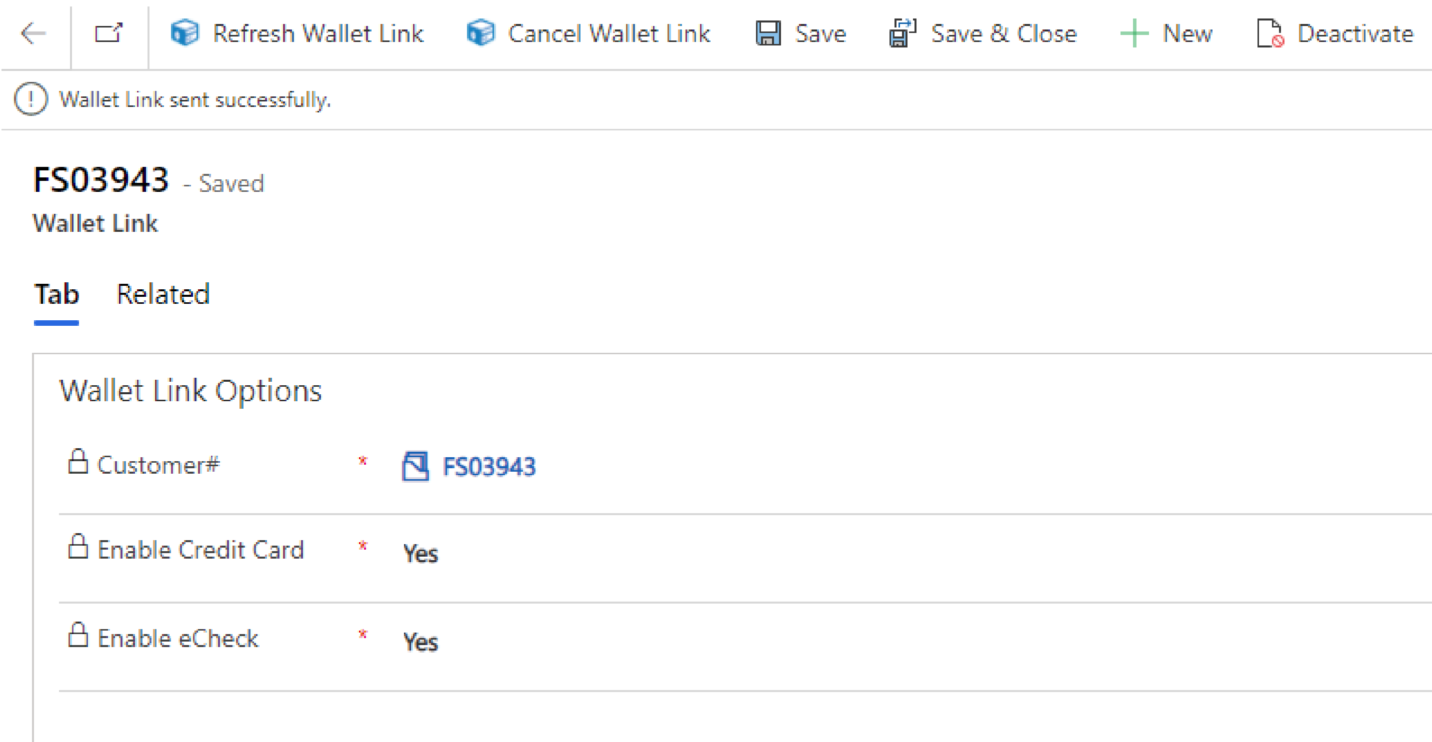
Refresh Wallet Link

To refresh a status of a sent Wallet Link record, double-click into the wallet link record from the wallet link grid, then click on Refresh Wallet Link button on the top navigation ribbon.



Cancel Wallet Link

To cancel a sent and non-completed Wallet Link record, select the Cancel Wallet Link button on the top navigation ribbon.



PayLink

PayLink feature provides merchant a secure method to collect payment information directly from their end-customer without having to handle sensitive card data.

Pre-requisite: Please make sure the PayLink device has been setup with PayFabric using the instruction here.

Generate PayLink

1. Navigate to **PayLink** within CRM Charge hub
2. Choose Create PayLink from the top navigation ribbon
3. Fill in the information into the New PayLink form then click Send PayLink

Field(s)	Required?	Description
Regarding	Yes	Associate a [supported] entity type to the ePayment Entry for the to-be-processed transaction.

Customer Name	No	Associate a customer account information for the generated payment link
Payment Amount	Yes	Amount of the transaction to be processed
Credit Card Gateway	Conditional	Determine which payment method you would like to use to receive the payment from a customer and choose an associated payment gateway to be used to process the transaction. **NOTE:** Either Credit Card Gateway or eCheck Gateway or both must be populated. Both option cannot be blank.
eCheck Gateway	Conditional	Determine which payment method you would like to use to receive the payment from a customer and choose an associated payment gateway to be used to process the transaction. **NOTE:** Either Credit Card Gateway or eCheck Gateway or both must be populated. Both option cannot be blank.
Transaction Type	Yes	**Sale** – process an actual charge against a payment link upon user completes a transaction. **Book** – process an authorization transaction against a payment link upon user completes a transaction.
Message	Optional	Reference information to the generated payment link so the payee can easily identify the reason they are making this payment.
Send Email To	Conditional	Specify the email address the payment link will be email to. **NOTE:** Either 'Send Email To' or 'Send SMS To' or both must be populated. Both option cannot be blank.
Send SMS To	Conditional	Specify the mobile phone number the payment link will be sent to. **NOTE:** 'Send Email To' or 'Send SMS To' or both must be populated. Both option cannot be blank.

Refresh PayLink

To refresh a status of a sent PayLink record, double-click into the payment link record from the PayLink grid, then click on Refresh PayLink button on the top navigation ribbon.

Cancel PayLink

To cancel a sent and non-completed PayLink record, select the Cancel Paylink button on the top navigation ribbon.

Surcharge

Surcharge allows participating merchants (US based merchants only, restriction applies to certain US states) to assess an additional fee to cardholders on credit transactions in order to recoup the merchant's cost of card acceptance.

Registration with the card brands is required to participate in the surcharge program. Merchant must receive the approval before implement surcharge with their business. It is merchant's sole responsibilities to review and adhere to their local & state laws before applying surcharge to their customers' transactions. Merchant must also understand and follow all the card brands rules and regulations to meet the surcharge's compliance requirements.

General Requirements Overview

1. Surcharge amount cannot be imposed on debit and/or prepaid card.
2. Surcharge must be a percentage of the transaction and must not exceed 4%.
Note: Surcharge percentage must be as high as merchant's lowest average cost of acceptance (merchant's transaction rate) for any particular card brand accepted by the merchant.
3. Merchant's intent to surcharge must be clearly listed with the surcharge amount.
4. Transaction receipt must include a separate line item with dollar amount within transaction.

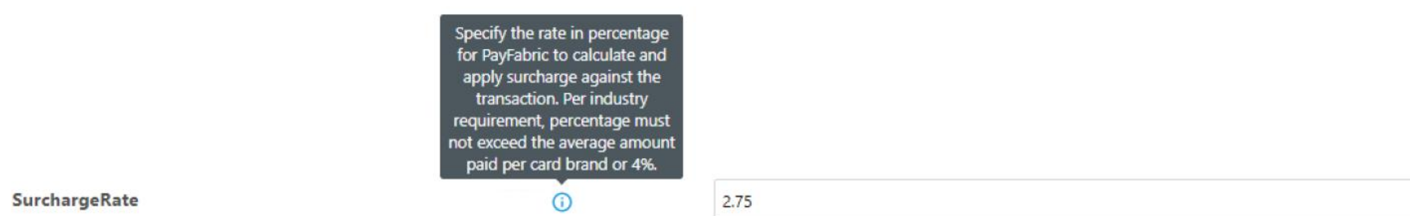
Support Surcharge with PayFabric

Currently, PayFabric only supports surcharge through **EVO** connector for card-not-present (CNP) transactions, support for other connectors/gateways will be added later as available.

Merchant **<u>must</u>** contact PayFabric Support for assistance from EVO Merchant Services in registering to participate in the surcharge program with the card brands.

Surcharge Percentage Setup

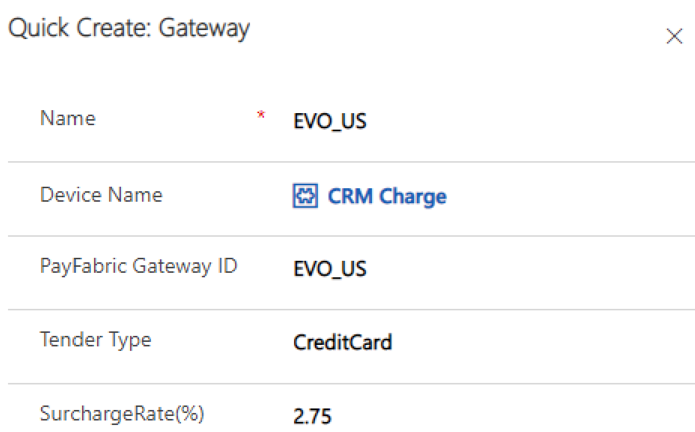
PayFabric will provide a field for merchant to specify the designated percentage rate for surcharge calculation under EVO's gateway profile account. PayFabric will also validate the percentage to ensure that it's greater than 0% and less than or equal to 4%.



Support Surcharge with CRM Charge

CRM Charge will provide a way for merchant to mimic the support from PayFabric with gateway profile. Under the CRM Charge setup, merchant can create a new gateway profile under the **Gateway** section and specify the designated percentage rate for surcharge calculation under gateway profile account.

Anytime the ePayment entry transaction is associated with the same gateway profile that has already been setup with surcharge and the card in used is not a debit/prepaid card, the surcharge will be applied to the transaction.



Quick Create: Gateway

Name *	EVO_US
Device Name	CRM Charge
PayFabric Gateway ID	EVO_US
Tender Type	CreditCard
SurchargeRate(%)	2.75

System Alert

CRM Charge utilizes System Alert to track any failure generated by Plugins, Workflows, Communication, etc.

API Integration

CRM Charge offers out-of-box API tools to provide 3rd party application provider or developer(s) to send transaction details to CRM Charge for later processing or reversal needs. Our CRM Charge API only supports Dynamics 365 Sales & Customer Service Hubs (cloud version).

In this section, we'll go through 2 different API methods: one is the API provided by Microsoft for obtaining token for authentication purpose, the other is the custom API developed by Nodus Technologies for CRM Charge integration purpose.

Get Token API

Purpose: Retrieve the token for authentication need.

Reference Link: https://docs.microsoft.com/en-us/powerapps/developer/data-platform/walkthrough-register-app-azure-active-directory

Request URL: https://login.microsoftonline.com/{crmkey}/oauth2/token

Request Method: POST

Parameter:

Parameter Name	Required?	Type	Description
resource	Yes	string	Address of CRM environment
client_id	Yes	string	Client ID
client_secret	Yes	string	Client Secret
grant_type	Yes	string	Value “client_credentials”

Return Example:


```
{
   "token_type": "Bearer",
   "expires_in": "3599",
   "ext_expires_in": "3599",
   "expires_on": "1634781085",
   "not_before": "1634777185",
   "resource": "https://nodusdev.crm.dynamics.com",
   "Access_token": "eyJ0eXAiOiJKV1QiLCJhbGciOiJSUzI1NiIsIng1dCI6Imwzc1EtNTBjQ0g0eEJWWkxIVEd3blNSNzY
4MCIsImtpZCI6Imwzc1EtNTBjQ0g0eEJWWkxIVEd3blNSNzY4MCJ9.eyJhdWQiOiJodHRwczovL25vZHVzZGV2LmNy
bS5keW5hbWljcy5jb20iLCJpc3MiOiJodHRwczovL3N0cy53aW5kb3dzLm5ldC8yNjZhNTM2Ny0xYTgwLTQyYmQtO
DdlYi0xNzQ2YmMzZDRhNzAvIiwiaWF0IjoxNjM0Nzc3MTg1LCJuYmYiOjE2MzQ3NzcxODUsImV4cCI6MTYzNDc4MTA
4NSwiYWlvIjoiRTJaZ1lDamcrUGlpTTlFK2Z0WWV2VHRNUmlmS0FRPT0iLCJhcHBpZCI6ImE5NWJmZjMwLTY5ZDUtNDIx
Mi1iMWMwLTBhZmMwMzEzYzA3NSIsImFwcGlkYWNyIjoiMSIsImlkcCI6Imh0dHBzOi8vc3RzLndpbmRvd3MubmV0LzI
2NmE1MzY3LTFhODAtNDJiZC04N2ViLTE3NDZiYzNkNGE3MC8iLCJvaWQiOiJmZDg3OWZiZS1kYTU1LTQyM2MtYTlwZ
S0wNDEzNzk1MzNkMmliLCJyaCI6IjAuQVM0QVoxTnFKb0FhdlVLSDZ4ZEd2RDFLY0REX1c2blZhUkpDc2NBS19BTVR3
SFV1QUFBLilsInN1YiI6ImZkODc5ZmJlLWRhNTUtNDIzYy1hMjBlLTA0MTM3OTUzM2QyYilsInRpZCI6IjI2NmE1MzY3LTFhO
DAtNDJiZC04N2ViLTE3NDZiYzNkNGE3MCIsInV0aSI6IkZIU2p2cnkybDBxaENYZlhWM3RHQUEiLCJ2ZXIiOiIxLjAifQ.bW5
7h_P0rQz5qSbDTaN-P6BEr6N_V3ipq4DEnTI61O7VyonMmrCEi62TVexbjacbpfGnNo-e2RArELM sBmgy3nEJda3lKcJ
Gxxpp90WLDocB00WwQPX7Hygak7aGzMrpe5MippjPb9eu0ZvUlGVBYi6vMXVT_qAoXBEPC6s_OYxvK0ZvVRhH3c
vCQEoV93btNpNXxg3Dngqh6TxOpxMCEDJBlogsnglbaldw78jV38ak7INiQF-EqOW7sKjfqi1ieTqHV8rkdF4MxW66q
9_eKPj5UNcQu7U-aRV3ObRPUUzqS52F4vbfXJnjtQeqDJNiHTaoE02rXbzMQNmT4sE5BQ "
}
```


Return Parameter Description:

Parameter Name	Type	Description
token_type	string	Token type
expires_in	long	Refresh token (seconds)
ext_expires_in	long	Refresh token expiration time (seconds)
expires_on	long	Token expiration time
not_before	long	The earliest time of token use
resource	long	Address of CRM environment
access_token	long	token

Important Notes:

To use the token to access the CRMCharge API, the application role of this APE must have the **"Nodus - ePayment Processor**" and **"Nodus - ePayment Administrator"** role permissions.

Transaction Integration API

Purpose: Import 3rd party transaction data into CRM Charge

Request URL: {{resourceurl}}/api/data/v{{version}}/nodus_createtransaction

Request Method: POST

Parameter:

Parameter Name	Required?	Type	Description
pftransactionkey	Yes	string	Payfabric Transaction Key
documenttype	Yes	string	Document type, currently supports the following types account/contact/lead/opportunity/case/entitlement/order/invoice/quote
documentnumber	Yes	string	Unique value of document type accountid or account custom field/contact or contact custom

			field/leadid/opportunityid/ticketnumber/entitlementid/ordernumber/invoicenumber/quotenumber
customer	No	string	The associated customer used to mark

Return Example:


```
{
   "@odata.context": "https://nodusdev.crm.dynamics.com/api/data/v9.2/$metadata#Microsoft.Dynamics.CRM.nodus_createtransactionResponse",
   "message": "22c89f80-0a32-ec11-b6e5-000d3a56be28",
   "result": true
}
```


Return Parameter Description

Parameter Name	Type	Description
message	string	CRM ePayment id
result	bool	Specify whether the integration was successful or failed

Notes: This API also supports importing PayPal transaction(s) in addition to basic credit card transactions.

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