



IMPORT GUIDE

PowerCharge

CRM 2011



Service



Support



Education



Add-ons

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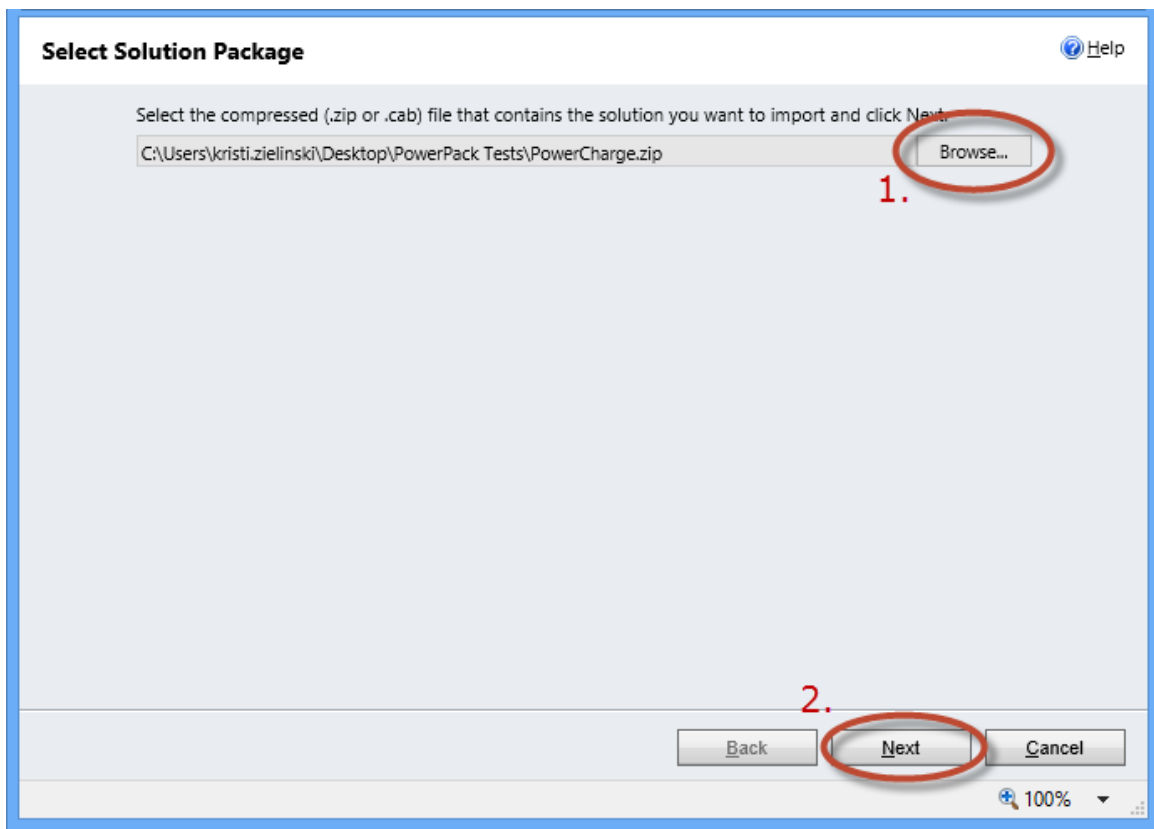
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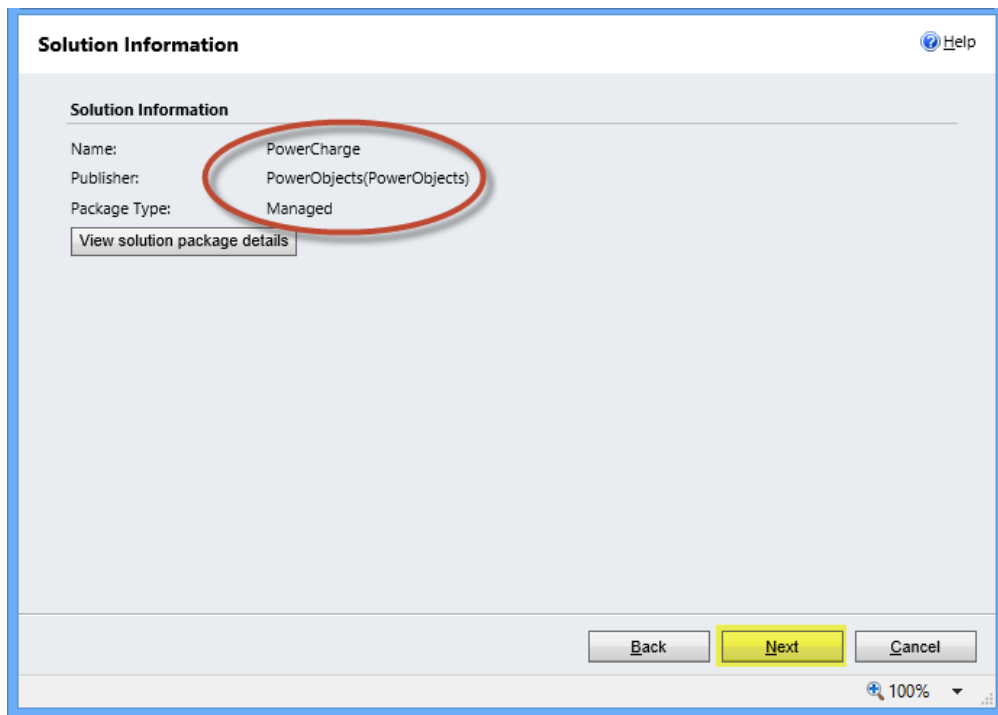
Import

The first step to installing any managed solution in Microsoft Dynamics CRM is to locate the file you want to install, download it and place it on your computer. In this instance, you would go to the PowerCharge webpage, click on Download Solution and save the file in a convenient place on your computer.

After you're done with that, log in to your Microsoft Dynamics CRM 2011 as a System Administrator or System Customizer – you must have administrative privileges. Navigate to Settings > Solutions and click on Import. The next window that opens will let you browse for the solution you are importing – navigate to the file, select it and click Next.

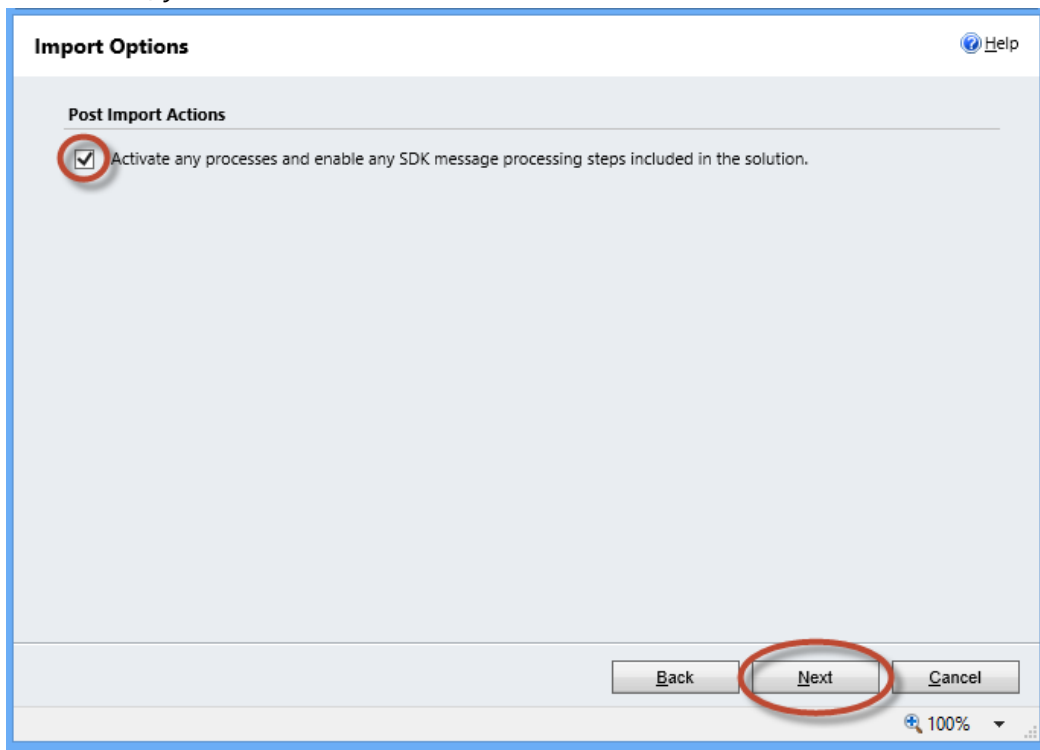


The next screen that opens up will show the Name / Publisher / Package Type of the solution you are installing. This screen should show PowerCharge from PowerObjects.

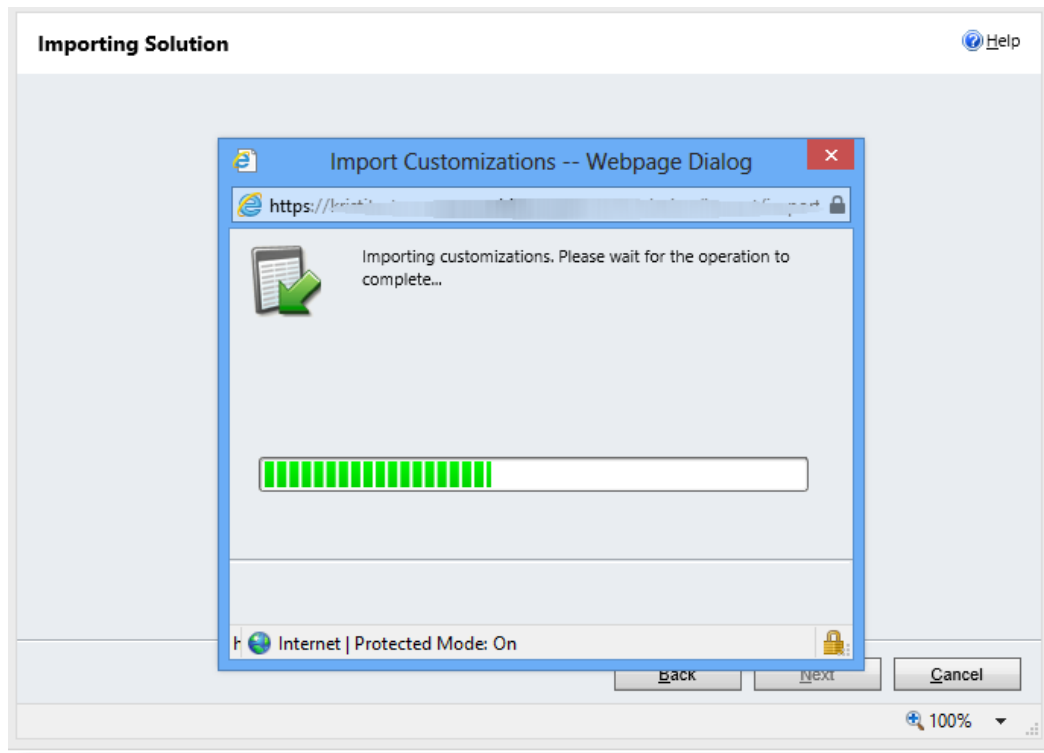


Click Next, and make sure to check the "Activate all processes..." checkbox, and click Next

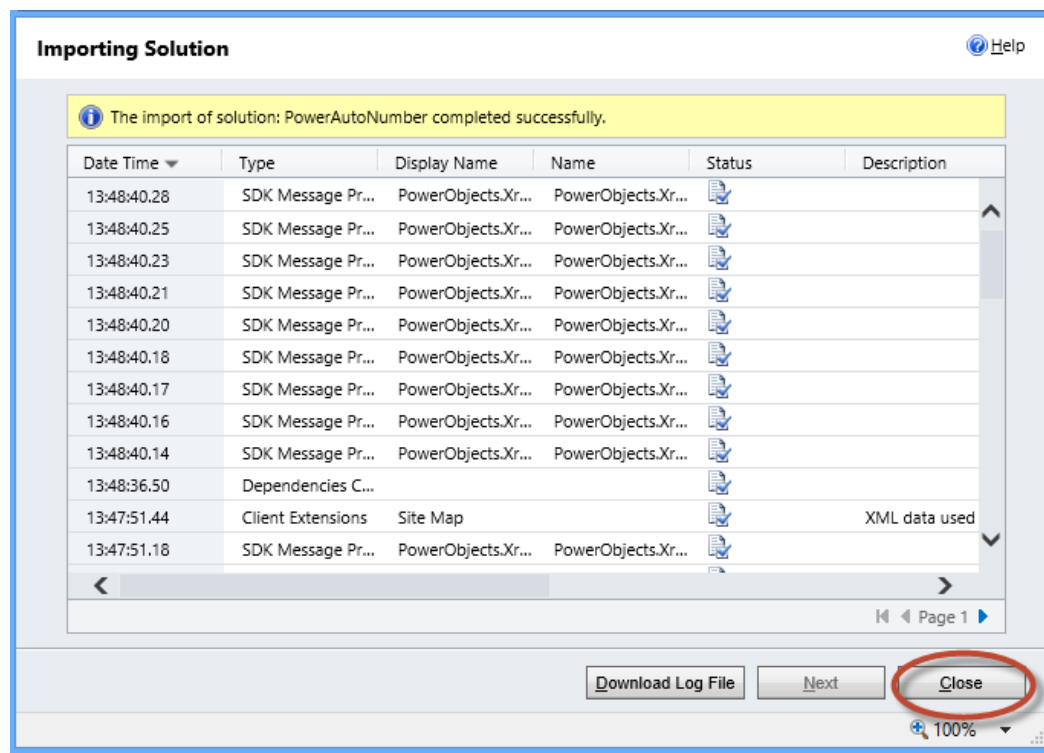
IMPORTANT: *If you do not check this box, the add-on WILL NOT FUNCTION CORRECTLY!*



A green progress indicator will display while the solution imports.



Once the solution is done importing, you will see a screen like the one below. The yellow bar along the top indicates that your solution has imported successfully. Click Close.



Register

In the Solutions Window, double click on PowerCharge. Fill in your information and click Submit. Be patient while the information is submitted.

The screenshot shows the 'Solution: PowerAutoNumber' window. On the left is a navigation tree with 'Information' selected. The main area has a 'POWER OBJECTS' logo and a 'Subscription Expires on 08/01/2013' notice. Below the logo are two tabs: 'Profile' and 'Payment History'. The 'Profile' tab contains a 'Submit' button (circled in red) and an 'Unsubscribe' button. Below these is a 'General' section with a form containing the following fields:

Field	Value	Field	Value
First Name *	PowerPack	Last Name *	Pro
Company *	PowerObjects	Main Phone *	6123393355
Address *	718 Washinton Ave. N	E-mail *	cecilie.svensgaard@powerobjects.com
City *	Minneapolis	Postal Code *	55401
State/Province *	MN	Country *	USA

Below the form, the status is 'Status: Subscribed'. At the bottom left, it says 'Status: Existing'. A 'Help' button is in the top right corner.

You are now registered for your free 30 day trial! For directions on how to use PowerCharge, please reference the PowerCharge user guide, which can be found on the [PowerCharge web page](#).

Configuring PowerCharge

Once you've clicked on the Gateway Tab, select the dropdown menu and select Authorize.net Group, BeanStream Group, ePN Group or ePN Test Group. Then select the Add Item(s) button.

The screenshot shows the 'POWER OBJECTS' logo and a 'Subscription Expires on 09/01/2013' notice. Below the logo are three tabs: 'Profile', 'Gateway Setup', and 'Payment History'. The 'Gateway Setup' tab is active. It contains a 'Save' button, a dropdown menu (showing 'Select One', 'Single Line', 'AuthorizeNe...', 'AuthorizeNe...', 'AuthorizeNe...'), an 'Add Item(s)' button (highlighted with a red arrow), and a 'Remove Setting' button. Below the buttons is a table with columns for 'Name' and 'Value'.

Name	Value
Single Line	
AuthorizeNe...	
AuthorizeNe...	
AuthorizeNe...	
AuthorizeNe...	

Enter the appropriate information in the Value column and click Save. Depending on the gateway you are connecting with, you may be asked to enter information about API Logins, Usernames, Passwords, etc.

For more information on how you should set up your payment gateways to best work with the add-on, please see the PowerCharge Gateway Configuration document, which can be found on the [PowerCharge web page](#).

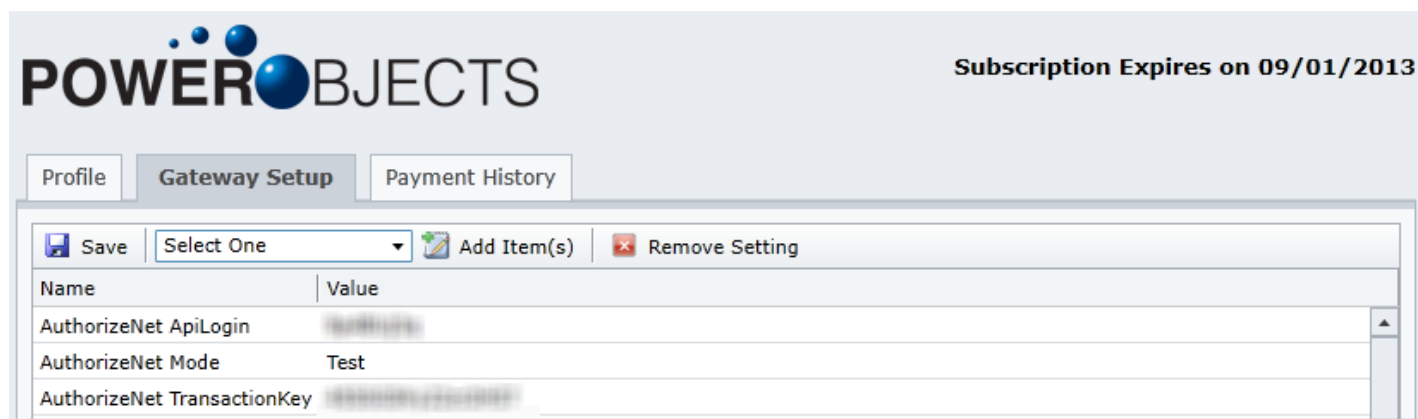
Note: *You will need a merchant account with authorize.net, BeanStream or eProcessing Network in order for PowerCharge to work in your CRM system. If you do not already have one of these merchant accounts, please contact:*

Nikki Norton
Business Consultant
Nikki@NortonBusinessSolutions.com
Direct: 612.803.1855

Setting Up Testing Accounts

Authorize.net

To set up a testing account with authorize.net, you will need to sign up for a test account on the [authorize.net website](#). Once you've set-up your account, grab the API Login and Transaction Key from your test account, and change the AuthorizeNet Mode to Test in the PowerCharge setup tab. Remember to set the Mode back to 'Live' once you enter your live account information.



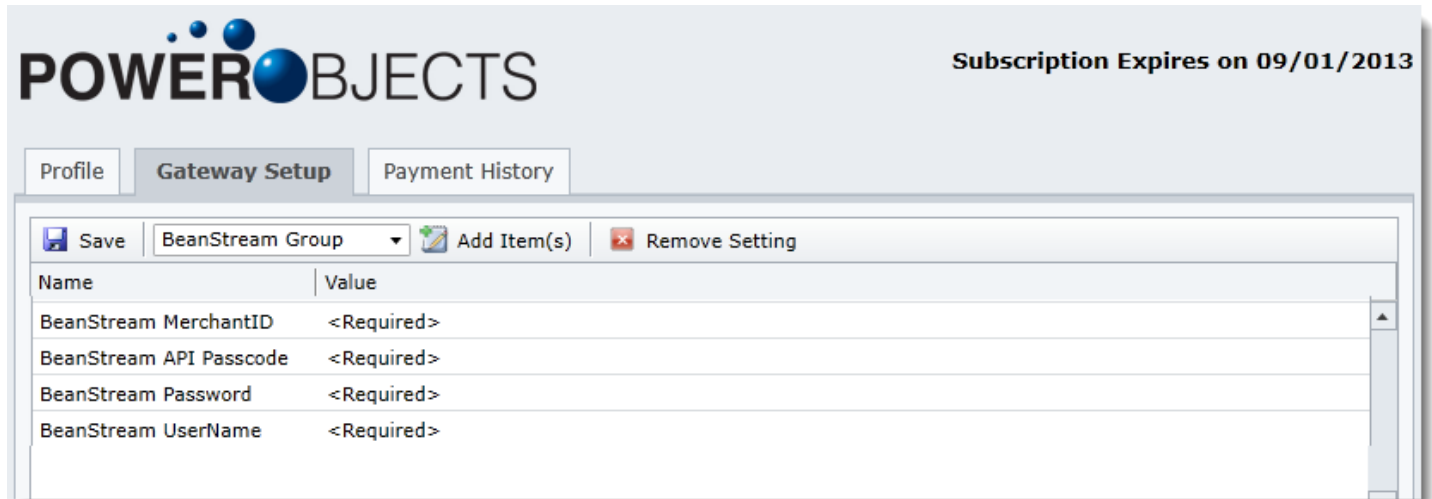
The screenshot shows the PowerObjects web interface. At the top, the logo "POWEROBJECTS" is on the left, and "Subscription Expires on 09/01/2013" is on the right. Below the logo are three tabs: "Profile", "Gateway Setup" (which is active), and "Payment History". Under the "Gateway Setup" tab, there is a "Save" button, a "Select One" dropdown menu, an "Add Item(s)" button with a plus icon, and a "Remove Setting" button with a minus icon. Below these buttons is a table with two columns: "Name" and "Value". The table contains three rows of settings for AuthorizeNet:

Name	Value
AuthorizeNet ApiLogin	[Redacted]
AuthorizeNet Mode	Test
AuthorizeNet TransactionKey	[Redacted]

Note: *It will NOT work to simply enter your live account's Login and Transaction Key, and set the mode to test. You must set up a test account on the authorize.net website.*

BeanStream

To set up a test account for the BeanStream payment gateway, send an email to support@beanstream.com, with your company and contact information. They will then setup a test account for you. Once your test account is created input the test account information in the PowerCharge setup tab. Remember to change this information to your live account information when you want to start processing actual cards with BeanStream.

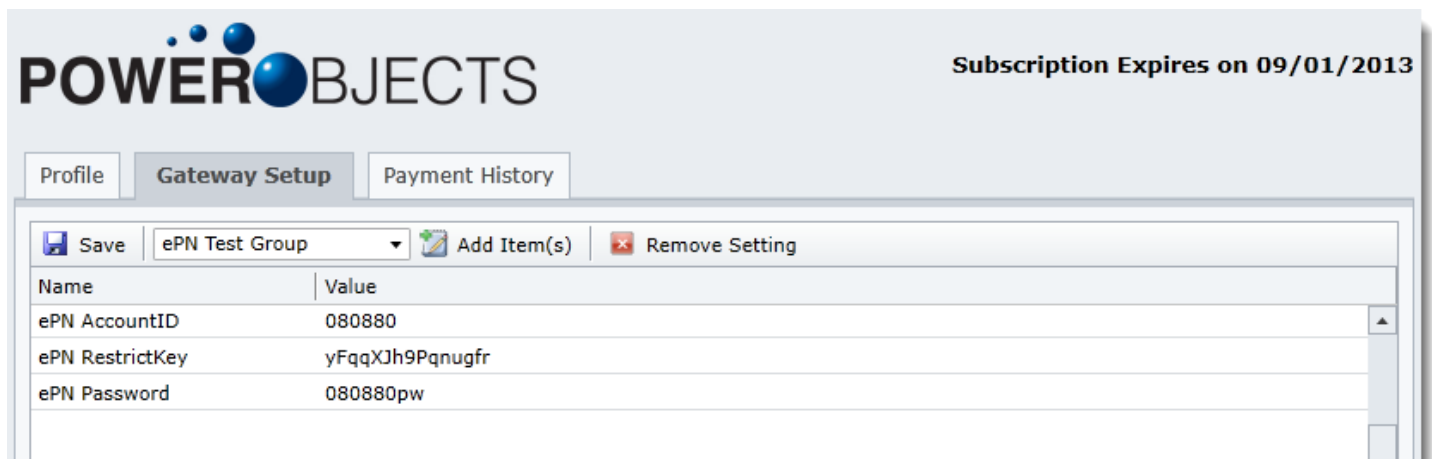


The screenshot shows the PowerObjects Gateway Setup interface. At the top, the logo "POWEROBJECTS" is on the left, and "Subscription Expires on 09/01/2013" is on the right. Below the logo are three tabs: "Profile", "Gateway Setup" (which is selected), and "Payment History". In the "Gateway Setup" tab, there is a "Save" button, a dropdown menu set to "BeanStream Group", and two buttons: "Add Item(s)" and "Remove Setting". Below these is a table with two columns: "Name" and "Value".

Name	Value
BeanStream MerchantID	<Required>
BeanStream API Passcode	<Required>
BeanStream Password	<Required>
BeanStream UserName	<Required>

ePN

If you are testing with ePN, choose the "ePN Test Group" in the PowerCharge setup tab, click "Add Items" and save. Test values are pre-populated for you. When you are finished testing, come back to the PowerCharge setup tab and remove the test items, by clicking on each item and selecting "remove setting". Then add the ePN Group and enter your live ePN account's values.

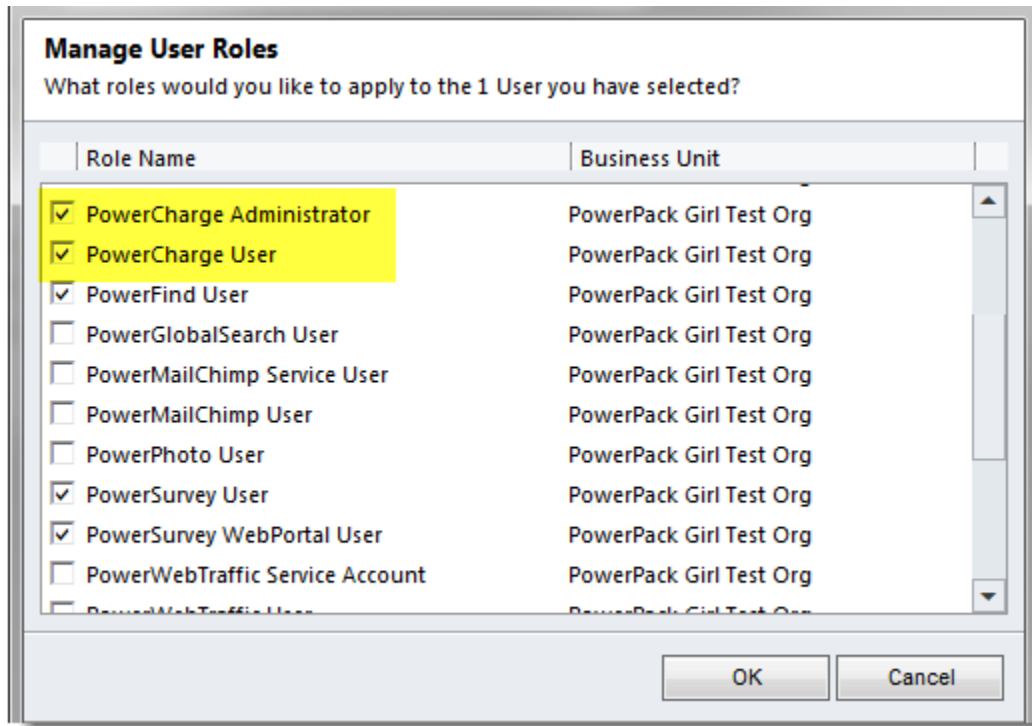


The screenshot shows the PowerObjects Gateway Setup interface for the "ePN Test Group". The layout is identical to the previous screenshot, but the dropdown menu is set to "ePN Test Group". The table below contains pre-populated test values.

Name	Value
ePN AccountID	080880
ePN RestrictKey	yFqqXJh9Pqnugfr
ePN Password	080880pw

Security Roles

Every user who would like to have access to PowerCharge will need the PowerCharge User or PowerCharge Administrator security role assigned to them. System Administrators will automatically see PowerCharge in their left navigation and be able to use PowerCharge, even without having the security role assigned.



Uninstalling PowerCharge

To uninstall, first delete any credit card records you've created. Then uninstall as usual, by deleting the solution.

Deleting the solution will remove the existing information and activities that have been populated into your records (so it will remove existing credit card and credit card transaction records) from CRM, but the information will still exist in the payment gateway.

Thanks for your interest in PowerCharge. Should you have any questions, contact us at 612-339-3355 or email powerpackpro@powerobjects.com. Remember, your trial will expire 30 days from the date of import. If you are interested in subscribing, go back to the configuration screen and change "try" to "subscribe" and enter your credit card information – you will be charged \$1/CRM user/month.

Interested in more CRM tips and tricks? Check out our [blog](#) or subscribe to our [newsletter](#).