Shopping Cart Configuration Wizard

Configuring Dynamics CRM to display list of products or services on CRM Portal requires complex set of records and JavaScript in CRM. Shopping Card Wizard does all the work for you.

Step 1: Preparing Product / Service entity in CRM

Create new CRM Entity or use an existing entity that represents the products or services to be listed on CRM portal. We link the following attributes of the entity, when displaying the list on portal:

**Name** - product name or product number. The Name is used as link to another web page that provides more information and details regarding the product and related products. The page is a Form of the entity.

**Description** – short description of the listed product.

**Price** – price per unit

**Product image URL** – each product can have different image. Users can configure these three images: product image, an image of basket, and the image for the delete function. The last 2 images are one image for all products.

**Portal Form and Portal View** – It’s highly recommended to create a separate portal form from other in-house CRM forms, to present relevant data to portal users. The form includes extra information regarding the product / service provided, and can include sub-grids from related entities to the product entity. An example for sub-grids are list of supporting documents, brochures, and images, or related / complementary products to the item displayed on portal.

Portal view filters which products / services to be listed, such as all active records or records that belong to a specified group.

Step 2: Configuration Wizard

Once the CRM entity configuration is completed, entering details to the Wizard is a simple selection that links between the fields, form, and view to the corresponding fields form and view in the configurator. For ease of testing the solution we provide temporary images stored on Dropbox. We recommend these URLs will be replaced with permanent and personalised locations.

To clear cache and reload new data log on to portal as Portal Administrator using this URL:
https://PortalName.microsoftcrmportal.com/_services/about

Upon completion of online purchase the following records are updated in CRM:

**Basket & Basket items** – the items selected to be purchased

**Basket History**

**Payment** – if Credit Card Payment Gateway is installed, the confirmation reference / details, received from the credit card provider, are stored in this record.

Step 3: Credit Card Payment Gateway

The Wizard is free to use solution. The solution also includes Credit Card Payment Gateway sold at per portal at one off payment at very competitive price. Credit Card Payment Gateway can be added or removed using Configuration Wizard.
The solution is using the below settings in Sandbox mode:

**API Login ID:** 7W7sGz2L  
**Transaction Key:** 2W4t8r3a22qU2wPC  
And can be tested with these sandbox accepted credit card numbers  
370000000000002 American Express  
6011000000000012 Discover  
5424000000000015 MasterCard  
40070000000027 Visa1  
4012888818888 Visa2  

Need support? Email us Sales @DynamicsObjects.com

After submission, select to add Credit Card Payment Gateway or go to Portal to view results.
Credit Card Payment Gateway configuration

Shopping Cart Configuration

Shopping Cart configured successfully without Payment Gateway.

Add Payment Gateway

Payment Configuration

Authorize.Net Type*: Sandbox
Application Id*: 7W7yGz2L
Transaction Key*: 2W4Rb3a22q1U2wPC

Submit

CRM Portal > All Products

All Products

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Amount</th>
<th>Buy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dynamics PDF-Docs</td>
<td>PDF documents generated with CRM Word Templates, attach to Email, Notes, and SharePoint as one click from the user interface and with scheduled CRM workflow</td>
<td>$1.00</td>
<td></td>
</tr>
<tr>
<td>Dynamics PDF-Docs Special Price</td>
<td>Buy 2 Dynamics PDF-Docs licenses and receive up to 4 licenses for 4 CRM instances of the same company (organization)- ideal for instances like: Production, Testing, AUI, Sandbox, all of one company</td>
<td>$1.00</td>
<td></td>
</tr>
<tr>
<td>Dynamics SPO</td>
<td>Dynamics SharePoint Organizer is a methodological way to organize documents in SharePoint so that they can be easily found when they are needed.</td>
<td>$1.00</td>
<td></td>
</tr>
</tbody>
</table>

Items In Basket
Basket 0 Item(s) sub-total $0
**CRM Portal > Product “more information” page (CRM Form)**

**Name**
Dynamics PDF-Docs

**Description**
PDF documents generated with CRM Word Templates, attach to Email, Notes, and SharePoint as one click from the User Interface and with scheduled CRM workflow.

**Price per unit**
$1.00

**Related Products**

<table>
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<tr>
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<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dynamics PDF</td>
<td>PDF SQL based reports (CRM report), Attach PDF to Email</td>
</tr>
<tr>
<td>Dynamics SharePoint Organizer (SPO)</td>
<td>Upload documents from CRM to SharePoint with metadata from CRM records, and save in any folder structure</td>
</tr>
</tbody>
</table>