

Contents

1. Overview	2
2. Extension Installation Steps	2
3. Extension Configurations Steps in Zoho CRM	2
4. Steps to Get the Razorpay Key Id, Key Secret in Razorpay	3
5. How to configure the Webhooks in Razorpay	3
6. Extension Functionality	4
6.1 Button: Send Razorpay Payment Link	5
6.2 Button: Resend Request Notification	5
6.3 Button: Cancel Payment Request	5
6.4 Custom Fields: Invoice Module	5
7. Extension Limitations	5
8. Extension Uninstallation Steps	6

Razorpay Payment Gateway Extension for Zoho CRM

1. Overview

Using this extension, Zoho CRM customers can easily connect their Razorpay account with the Zoho CRM and send the Razorpay payment link to the customer from the Deals and Invoice module to Zoho CRM. This extension sends the Payment Request Link to the customer, Cancel the Payment Request and Send the Payment Request Notification to their customer from Deals and Invoice module. This User Manual document covers step-by-step instructions to install this extension from Zoho Marketplace and how to configure and use the integration functionality within your Zoho CRM account.

2. Extension Installation Steps

Go to Zoho Marketplace and search for “Razorpay Payment Gateway Extension for Zoho CRM” to locate the extension and install directly from the Marketplace. Also, you can install the Razorpay Payment Gateway Extension for Zoho CRM by logging in to your Zoho CRM account and follow the below installation steps.

To install the Razorpay Payment Gateway Extension from Zoho CRM:

- ❓ Go to Setup -> Marketplace -> All. By default, all the Zoho Extensions currently installed within your Zoho CRM account are listed.
- ❓ Go to “All Extensions” tab to view all available Extensions.
- ❓ Click All Extensions, browse/search for Razorpay Payment Gateway Extension for Zoho CRM.
- ❓ Click Install button. Make sure you check the “Agree to the Terms of Service” checkbox and click Install.

3. Extension Configurations Steps in Zoho CRM

Once installed the extension, automatically the page will be redirect to the Extension Setting page. This page to configuring the “Razorpay – Key Id” and “Razorpay – Key Secret” field to connect the Zoho CRM and Razorpay account.

Extension Settings

Razorpay - Key Id	XXXXXXXXXXXXXXXXXX
Razorpay - Key Secret	XXXXXXXXXXXXXXXXXX

CancelSave

Once Save the above Extension Settings, the page will be redirect to the Extension Details page. In this page, you can get the Payment Update URL. Please find the below screenshot.

Razorpay Payment Gateway Extension for Zoho CRM

Extension Settings

Payment Update URL	https://platform.zoho.com/crm/v2/functions/razorpaypaymentgatewayextensionforzohocrm__getpaymentresponse/actions/execute?auth_type=apikey&zaplkey=1003.eed1235f
Razorpay - Key Id	
Razorpay - Key Secret	

This Payment Update URL is unique for all the organization and it is very important because we need to configure this URL in the Razorpay account Webhooks for payment updates.

Note: After creating the Webhooks in the Razorpay account then only all the payments status will be sync back into the Zoho CRM.

4. Steps to Get the Razorpay Key Id, Key Secret in Razorpay

To get the Key Id and Key Secret from Razorpay account, please follow the below steps:

- ❑ Log into your <https://dashboard.razorpay.com/> with appropriate credentials.
- ❑ Select the mode (**Test** or **Live**) for which you want to generate the API key.
- ❑ Navigate to **Settings** → **API Keys** → **Generate Key** to generate key for the selected mode. The Key Id and Key Secret appear in the popup.

Step by Step Reference Link -

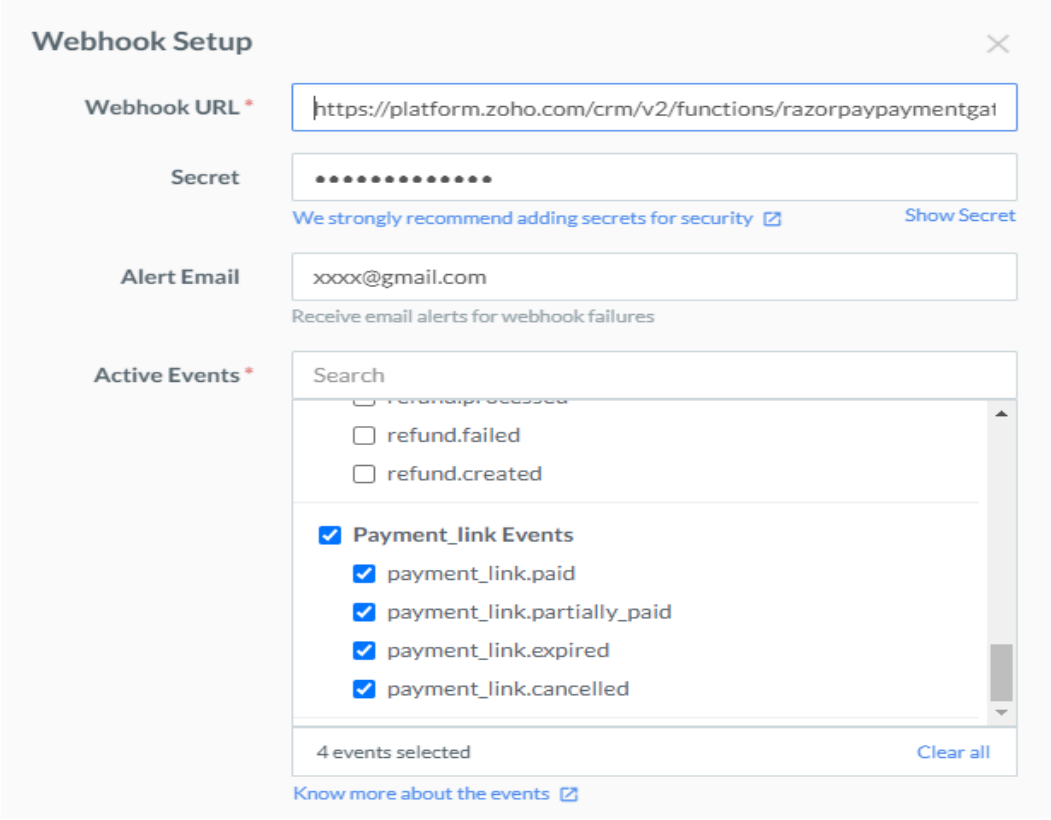
<https://razorpay.com/docs/payment-gateway/dashboard-guide/settings/api-keys/>

5. How to configure the Webhooks in Razorpay

Please follow the below steps to configure the Webhooks in Razorpay account.

- ❑ Log into your <https://dashboard.razorpay.com/> and navigate to **Settings** -> **Webhooks**.
- ❑ Click + **Add New Webhook**.
- ❑ In the **Webhook Setup** modal:
 - Enter the **“Payment Update URL”** which you have copied from the Extension Settings section in the Zoho CRM.
 - Enter a **Key Secret** for the webhook endpoint.
 - Select the all 4 events related to “Payment_link Events” from the list of **Active Events**. Please find the below screenshot.
- ❑ Click **Create Webhook**.

Razorpay Payment Gateway Extension for Zoho CRM



The Webhook Setup dialog box contains the following fields and options:

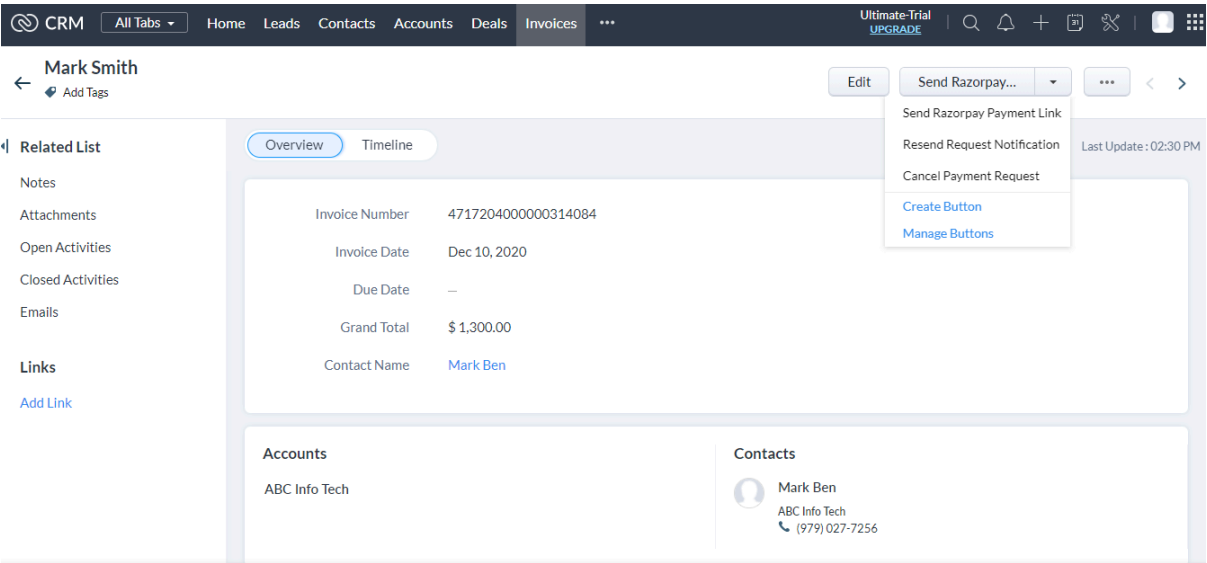
- Webhook URL ***: `https://platform.zoho.com/crm/v2/functions/razorpaypaymentgai`
- Secret**: A masked field with 10 dots. Below it, a message reads: "We strongly recommend adding secrets for security" with a checkmark icon and a "Show Secret" link.
- Alert Email**: `xxxx@gmail.com`. Below it, a message reads: "Receive email alerts for webhook failures".
- Active Events ***: A list of events with checkboxes. The "Payment_link Events" section is expanded, showing four checked events: `payment_link.paid`, `payment_link.partially_paid`, `payment_link.expired`, and `payment_link.cancelled`. Above this list is a search bar and two unchecked events: `refund.failed` and `refund.created`. At the bottom of the list, it says "4 events selected" and a "Clear all" link. Below the entire list is a "Know more about the events" link with a checkmark icon.

Step by Step Reference Link -

<https://razorpay.com/docs/payment-gateway/dashboard-guide/settings/webhooks/>

6. Extension Functionality

Once done all the setup in the Razorpay Payment Gateway Extension it's ready to use all the below functionalities. After successful installation of the extension the following 3 buttons has been created in the Zoho CRM Deals and Invoice module and it's placed on the Deals and Invoice View page like below screenshot.



The screenshot shows the Zoho CRM interface for a contact named Mark Smith. The top navigation bar includes "CRM", "All Tabs", and various modules like Home, Leads, Contacts, Accounts, Deals, and Invoices. The "Invoices" module is active. On the left, there's a "Related List" sidebar with options like Notes, Attachments, Open Activities, Closed Activities, Emails, Links, and Add Link. The main content area shows an "Overview" tab with invoice details: Invoice Number (471720400000314084), Invoice Date (Dec 10, 2020), Due Date (—), Grand Total (\$ 1,300.00), and Contact Name (Mark Ben). Below this, there are sections for "Accounts" (ABC Info Tech) and "Contacts" (Mark Ben, ABC Info Tech, (979) 027-7256). On the right, a dropdown menu is open, showing three buttons: "Send Razorpay...", "Send Razorpay Payment Link", and "Resend Request Notification". Below these, there are links for "Cancel Payment Request", "Create Button", and "Manage Buttons". The "Last Update" is shown as 02:30 PM.

Razorpay Payment Gateway Extension for Zoho CRM

6.1 Button: Send Razorpay Payment Link

This button is used for sending the Payment Links to your customers through SMS and email to collect payments from them. Customers can click on the URL, which opens the payment request page, and complete the payment using any of the available payment methods. Once customer paid through Payment Link, the status of the payment will be updated back into the Zoho CRM.

6.2 Button: Resend Request Notification

This button is used for resending the Payment Request Link to your customer through email anytime.

6.3 Button: Cancel Payment Request

You can cancel the payment request to the customer any time from Zoho CRM. We can not cancel the Payment Request if the payment is already paid.

6.4 Custom Fields: Deals & Invoice Module

In the deals and invoice module, we have added the following 4 fields (Payment Link Id, Payment Id, Payment Status and Payment URL). After Sending the Payment Link to the customer, the Payment URL, Payment Link Id is captured in the Deals/Invoice module and the Payment Status changed to “created”. Once paid from the customer, then the payment Payment Id and Payment Status is automatically changed to the “paid”.

Please find the below screenshot for custom fields in the Invoice module.

The screenshot shows the 'Edit Invoice' form in Zoho CRM. At the top, there are buttons for 'Cancel', 'Save and New', and 'Save'. The form is divided into two columns. The left column contains fields for 'Invoice Owner' (Zoho Crazy Zoho Crazy), 'Subject' (Mark Smith), 'Invoice Date' (Dec 10, 2020), 'Due Date' (MMM D, YYYY), 'Sales Commission' (\$), 'Account Name' (ABC Info Tech), 'Contact Name' (Mark Ben), 'Payment URL' (https://rzp.io/l/FVusjP8W), and 'Payment Status' (created). The right column contains fields for 'Sales Order', 'Purchase Order', 'Excise Duty' (\$), 'Status' (Created), 'Payment Id', and 'Payment Link ID' (plink_GBHOsZPvTRFy).

7. Extension Limitations

Due to the API limitation, Please find the below list of limitations in this extension.

- ❓ We can not update the Invoice Amount and Invoice Customer Details after sending the Payment Link to the Customer from the Zoho CRM Invoices.
- ❓ You must configure the Webhooks manually in the Razorpay account.
- ❓ Verify your base currency in the Zoho CRM is equal to the currency in the Razorpay account.

8. Extension Uninstallation Steps

Uninstalling this extension from Zoho CRM will delete all its associated data.

To uninstall Razorpay Payment Gateway Extension, please follow the below steps:

- ❑ Go to Setup -> Marketplace -> All -> Installed tab. All the installed Extensions will be listed.
- ❑ Browse for Razorpay Payment Gateway Extension and click on Uninstall link.
- ❑ Click Okay to confirm in the confirmation pop-up that follows. The Extension will be uninstalled.