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1. Overview

Using this extension, Zoho CRM customers can easily connect their Accept Blue account with the Zoho CRM and send the Accept Blue payment link to the customer from the Zoho CRM Invoice module. This extension having the following functionalities i) creates and sends the Accept Blue Invoice to the customer ii) Cancel the Sent Invoice iii) Reactivate the canceled invoice within CRM. 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

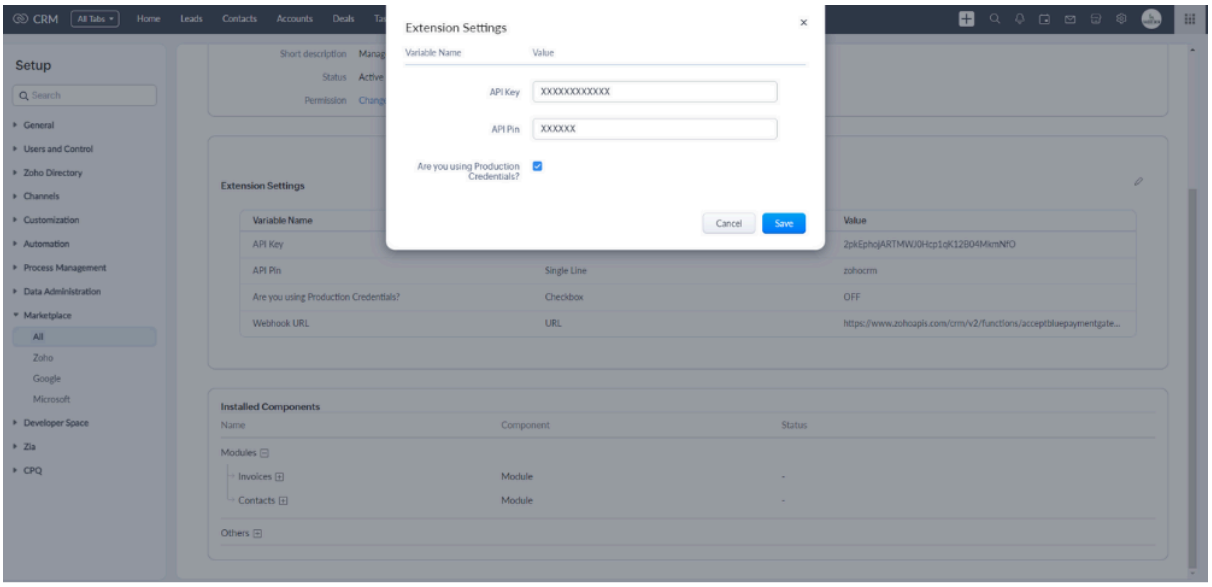
Go to Zoho Marketplace and search for “Accept Blue Payment Gateway Extension for Zoho CRM” to locate the extension and install directly from the Marketplace. Also, you can install the Accept Blue Payment Gateway Extension for Zoho CRM by logging in to your Zoho CRM account and follow the below installation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

To install the Accept Blue 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 the “All Extensions” tab to view all available Extensions.
- Click All Extensions, browse/search for Accept Blue Payment Gateway Extension for Zoho CRM.
- Click the Install button. Make sure you check the “Agree to the Terms of Service” checkbox and click Install.

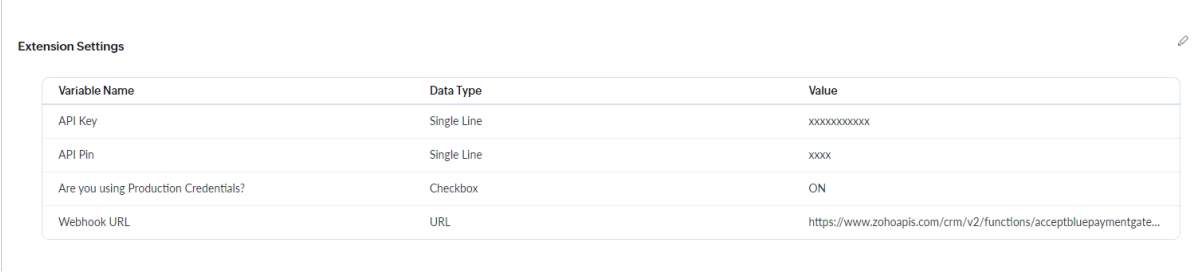
3. Extension Configurations Steps in Zoho CRM

Once installed the extension, automatically the page will be redirected to the Extension Setting page. This page to configuring the “Accept Blue – API Key” and “Accept Blue – API Pin“ fields to connect the Zoho CRM and Accept Blue account.



ENTER THE ACCEPT BLUE API KEY AND API PIN. FOR TESTING WITH ACCEPT BLUE SANDBOX ACCOUNT, PLEASE UNCHECK THE "ARE YOU USING PRODUCTION CREDENTIALS?" CHECKBOX

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



Extension Settings

Variable Name	Data Type	Value
API Key	Single Line	xxxxxxxxxx
API Pin	Single Line	xxxx
Are you using Production Credentials?	Checkbox	ON
Webhook URL	URL	https://www.zohoapis.com/crm/v2/functions/acceptbluepaymentgate...

This Webhook URL is unique for each organization and it is very important because we need to configure this URL in the Accept Blue account under the Webhooks for payment updates from the Accept Blue to Zoho CRM.

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

4. Steps to Get the Accept Blue API Key, API Pin in Accept Blue

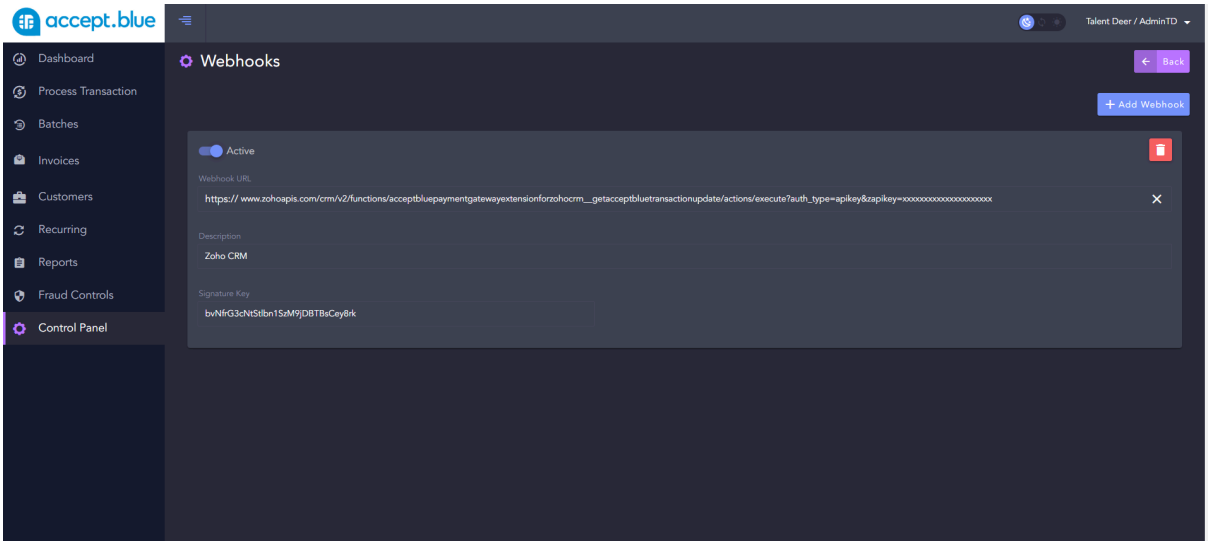
To get the Key Id and Key Secret from Accept Blue account, please follow the below steps:

- Log into your https://merchant.accept.blue/login with appropriate credentials.
- Navigate to **Control Panel** → **Source Management** → **Create Key** to generate key for the integration. The API Key and API Pin will appear in the popup.

5. How to configure the Webhooks in Accept Blue

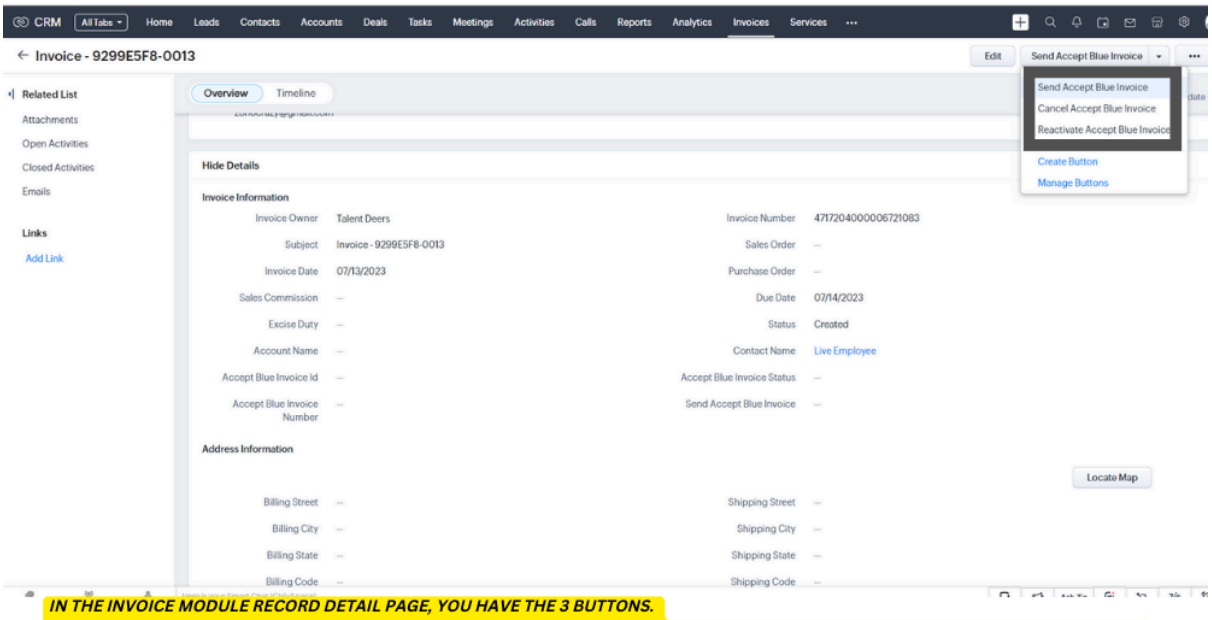
Please follow the below steps to configure the Webhooks in Accept Blue account.

- Log into your https://merchant.accept.blue/login with appropriate credentials.
- Navigate to **Control Panel** → **Webhooks** → **Set Active**
- In the **Webhook Setup** modal:
  - Enter the **"Webhook URL"** which you have copied from the Extension Settings section in the Zoho CRM.
  - Enter a **Name** for the webhook endpoint.



6. Extension Functionality

Once done all the setup in the Accept Blue 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 Invoice module and it's placed like below screenshot.



IN THE INVOICE MODULE RECORD DETAIL PAGE, YOU HAVE THE 3 BUTTONS.
1) SEND ACCEPT BLUE INVOICE - WHEN YOU CLICK THE BUTTON IT WILL CREATE AN INVOICE AND SEND THE PAYMENT REQUEST TO YOUR CUSTOMER THROUGH THE ACCEPT BLUE
2) CANCEL ACCEPT BLUE INVOICE - YOU CAN CANCEL THE SENT INVOICE ANYTIME
3) REACTIVATE ACCEPT BLUE INVOICE - YOU CAN REACTIVATE THE CANCELED INVOICE ANYTIME

6.1 Button: Send Accept Blue Invoice

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

6.2 Button: Reactivate Accept Blue Invoice

This button is used to reactivate the canceled invoice request.

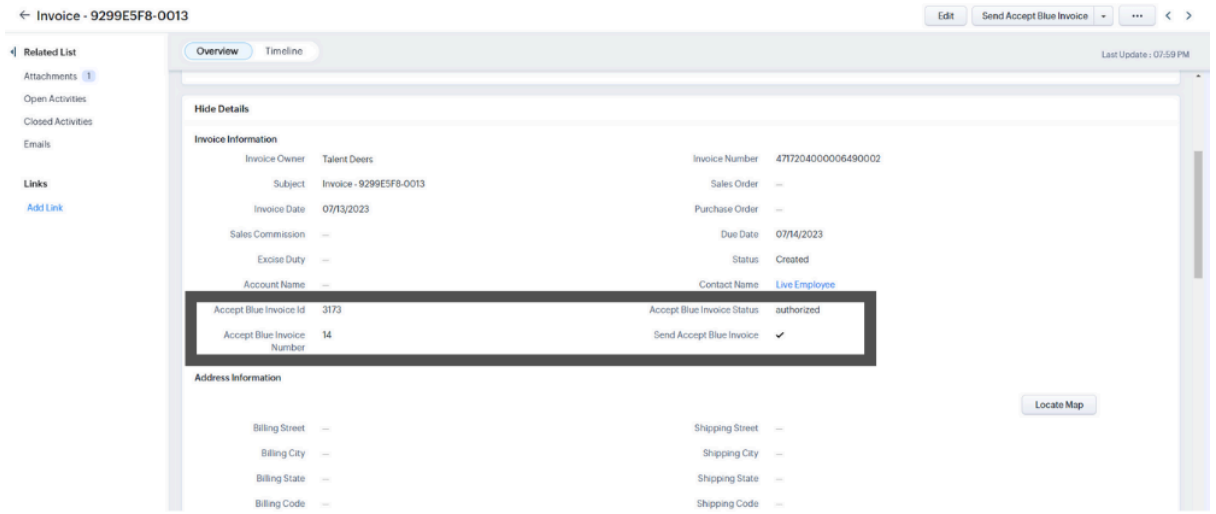
6.3 Button: Cancel Accept Blue Invoice

You can cancel the sent invoice 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 invoice module, we have added the following 4 fields (Accept Blue Invoice Id, Invoice Number, Accept Blue Invoice Status and Send Accept Blue Invoice Checkbox). After Sending the invoice to the customer, the invoice id, invoice number, and status (sent) were captured in the Invoice module. Once paid from the customer, then the Payment Status is automatically changed to the "paid" or "authorized".

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



ONCE CREATED AN INVOICE IN THE ACCEPT BLUE THROUGH THE BUTTON OR WORKFLOW, AUTOMATICALLY INVOICE ID, INVOICE NUMBER AND INVOICE STATUS (SENT) WILL BE CAPTURED. ONCE CUSTOMER PAID, ACCEPT BLUE INVOICE STATUSSS WILL BE CHANGED TO AUTHORIZED OR PAID.

IF YOU WANT TO CREATE AND SEND AN AUTOMATED ACCEPT BLUE INVOICE, YOU CAN USE THE ZOHO CRM WORKFLOW TO SELECT THE "SEND ACCEPT BLUE INVOICE" CHECKBOX, IT WILL AUTOMATICALLY CREATE AND SEND INVOICE THROUGH ACCEPT BLUE.

7. Extension Limitations

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

- You must configure the Webhooks manually in the Accept Blue account for payment update from Accept Blue to Zoho CRM
- This integration does not support the invoice level taxes, discounts or adjustment. It supports only the line item level taxes and discounts.
- We can not update the Invoice Amount and Invoice Customer Details after sending the Payment Link to the Customer from the Zoho CRM Invoices.
- Verify your base currency in the Zoho CRM is equal to the currency in the Accept Blue account.

8. Extension Uninstallation Steps

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

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

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