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1. Overview

Using this extension, Zoho CRM customers can easily connect their Stripe account with the Zoho CRM and send the Stripe payment link to the customer from the Zoho CRM Invoice module. This extension to sending the Payment Request Link to the customer, Cancel (Void) the Payment Request and Send the Payment Request Notification to their customer from the 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 “Stripe Payment Gateway Extension for Zoho CRM” to locate the extension and install directly from the Marketplace. Also, you can install the Stripe Payment Gateway Extension for Zoho CRM by logging in to your Zoho CRM account and follow the below installation steps.

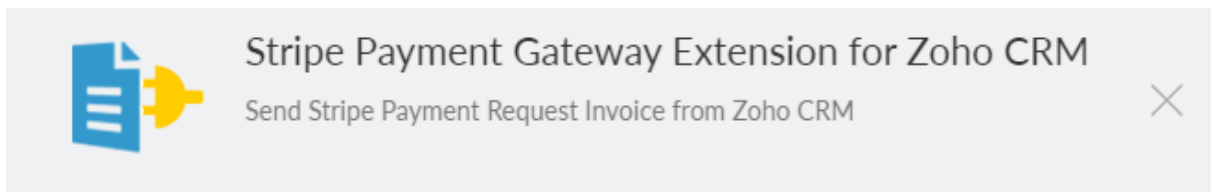
To install the Stripe Payment Gateway Extension from Zoho CRM:

- ❑ 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 Stripe 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 “API Secret Key” field to connect the Zoho CRM and Stripe account.

Stripe Payment Gateway Extension for Zoho CRM



Your extension has been installed successfully.

Configure the extension settings to activate this extension.

Extension Settings

API Secret Key

XXXXXXXXXX|

Cancel

Save

Once Save the above Extension Settings, the page will be redirected to the Extension Details page. In this page, you can see the Webhook Id field. It's automatically filled after providing the API Secret Key.

Note: A Webhook Id field is verified your stripe account connects with the Stripe account through webhook. If Webhook Id present then only all the payments status will be sync back into the Zoho CRM.

4. Steps to Get the API Secret Key in Stripe

To get the API Secret Key from Stripe account, please follow the below steps:

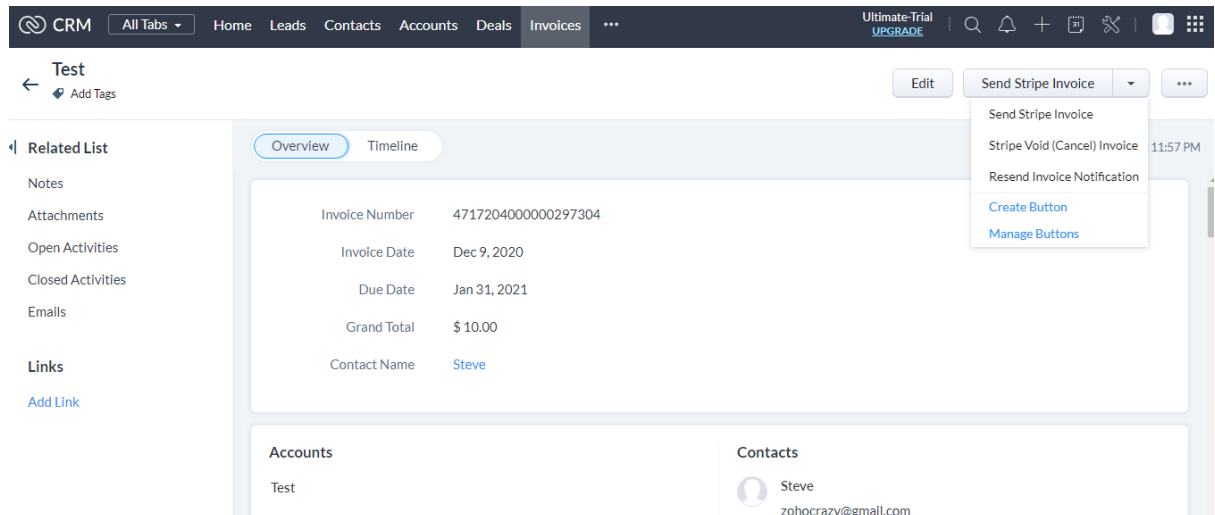
- 🔗 Log into your <https://dashboard.stripe.com/> with appropriate credentials.
- 🔗 Navigate to **Developers** → **API Keys** → **Secret Key** to generate key.

Step by Step Reference Link - <https://stripe.com/docs/keys>

5. Extension Functionality

Once done all the setup in the Stripe 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 on the Invoice View page like below screenshot.

Stripe Payment Gateway Extension for Zoho CRM



6.1 Button: Send Stripe Invoice

This button is used for sending the Payment Links to your customers through 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 Invoice Notification

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

6.3 Button: Stripe Void (Cancel) Invoice

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 Button: Send Bulk Stripe Invoice

This button is used for sending the bulk Payment Links to your customers through email to collect payments from them. For this, you need to create a custom view first with below conditions as per below screenshot. Then select the multiple records from the custom view and send it to your customer. Please find the below screenshots for your reference.

- 1) Go to Invoice -> Select the All Invoice DropDown -> New Custom View

Stripe Payment Gateway Extension for Zoho CRM

The screenshot shows the Zoho CRM Invoices list view. A filter menu is open on the left, showing 'All Invoices' and 'Created By Me'. The 'Created By Me' filter is selected, and the 'Need to send stripe invoice' condition is applied. The table displays three records with columns: Subject, Status, Stripe Invoice Id, Stripe Invoice URL, and Invoice Date.

Subject	Status	Stripe Invoice Id	Stripe Invoice URL	Invoice Date
trest	Created	in_1KCedZD0nf6h9PIUER O202ol	https://invoice.stripe.com/i /acct_119turD0nf6h9PIU/t est_YWNjdF8xSTI0dXJEM G5mNmG5UGxVLF9Lc1BT azZ3U0doQjB1VHJYWm MwMGZhSXI3dkl2SmVp0 100GxiBTYQT	Mar 18, 2021
Test	Created	in_1KCeUCD0nf6h9PIUZ1 RnXq2v	https://invoice.stripe.com/i /acct_119turD0nf6h9PIU/t est_YWNjdF8xSTI0dXJEM G5mNmG5UGxVLF9Lc1BJ WFQ3QWh3NXpOckJQck lpSmdBc2FmaTd3U0po01 00mrAKhmvZ	Jan 15, 2021
Test	Created		https://invoice.stripe.com/i /acct_119turD0nf6h9PIU/i	Jan 15, 2021

2) Create View Name and provide the below conditions as per below screenshot.

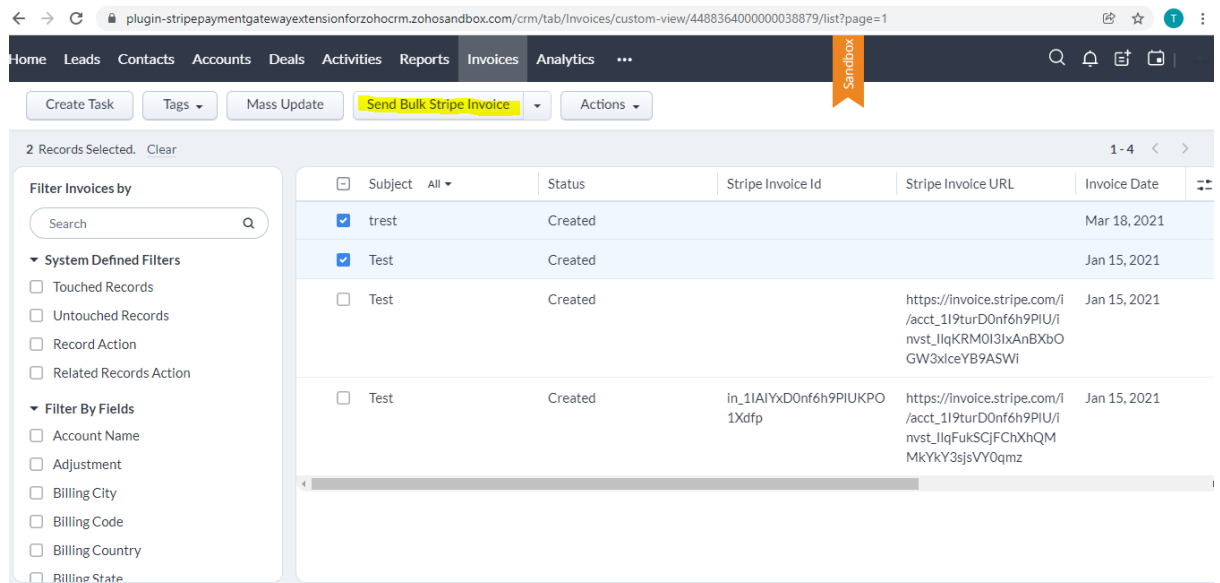
The screenshot shows the Zoho CRM Custom View creation screen. The view name is 'Custom View (Need to Send Stripe Invoice)'. The criteria are defined as follows:

- 1. Stripe Invoice Id is empty (EMPTY)
- 2. Contact Name is not empty (NOTEMPTY)
- 3. Due Date is not empty (NOTEMPTY)

The criteria pattern is ((1 and 2) and 3). The columns selected are Subject, Account Name, and Adjustment.

3) After creating the view. you can select multiple records from the view and send it to your customer using the “Send Bulk Stripe Invoice” button..

Stripe Payment Gateway Extension for Zoho CRM



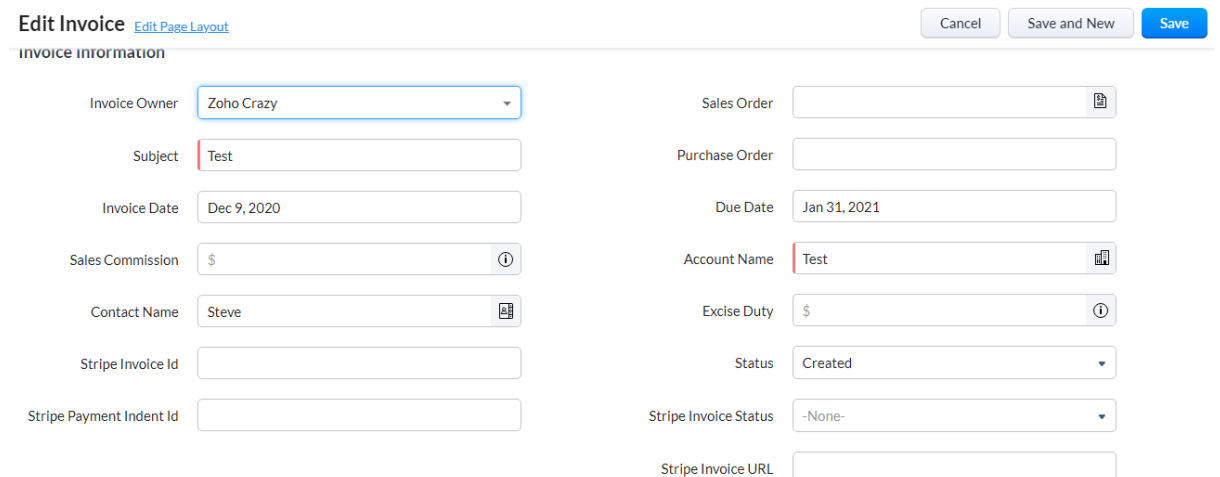
The screenshot shows the Zoho CRM Invoices module interface. At the top, there's a navigation bar with tabs for Home, Leads, Contacts, Accounts, Deals, Activities, Reports, Invoices, and Analytics. Below this is a toolbar with buttons for 'Create Task', 'Tags', 'Mass Update', 'Send Bulk Stripe Invoice' (highlighted), and 'Actions'. A 'Sandbox' badge is visible on the right. The main area displays a table of invoices with columns: Subject, Status, Stripe Invoice Id, Stripe Invoice URL, and Invoice Date. Two records are selected, indicated by checkboxes and a '2 Records Selected' message. A left sidebar contains 'Filter Invoices by' options, including 'System Defined Filters' (Touched Records, Untouched Records, Record Action, Related Records Action) and 'Filter By Fields' (Account Name, Adjustment, Billing City, Billing Code, Billing Country, Billing State).

Subject	Status	Stripe Invoice Id	Stripe Invoice URL	Invoice Date
☒ trest	Created			Mar 18, 2021
☒ Test	Created			Jan 15, 2021
☐ Test	Created		https://invoice.stripe.com/i/acct_119turD0nf6h9PIU/i/nvst_1lqKRM0I3lxAnBXbOGW3xIcYB9ASWI	Jan 15, 2021
☐ Test	Created	in_11AIYxD0nf6h9PIUKPO1Xdfp	https://invoice.stripe.com/i/acct_119turD0nf6h9PIU/i/nvst_1lqFukSCJFChXhQMkYkY3sjsVY0qmqz	Jan 15, 2021

6.5 Custom Fields: Invoice Module

In the invoice module, we have added the following 4 fields (Stripe Invoice Id, Stripe Invoice URL, Stripe Invoice Status and Stripe Payment Indent Id). After Sending the Payment Link to the customer, the Stripe Invoice URL, Stripe Invoice Id is captured in the Invoice module and the Stripe Invoice Status changed to “open”. Once paid from the customer, then the Stripe Payment Indent 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's a header with 'Edit Invoice' and a link to 'Edit Page Layout'. Below this is a 'Cancel' button, a 'Save and New' button, and a 'Save' button. The form is divided into two columns. The left column contains fields for 'Invoice Owner' (Zoho Crazy), 'Subject' (Test), 'Invoice Date' (Dec 9, 2020), 'Sales Commission' (\$), 'Contact Name' (Steve), 'Stripe Invoice Id', and 'Stripe Payment Indent Id'. The right column contains fields for 'Sales Order', 'Purchase Order', 'Due Date' (Jan 31, 2021), 'Account Name' (Test), 'Excise Duty' (\$), 'Status' (Created), 'Stripe Invoice Status' (-None-), and 'Stripe Invoice URL'.

6. 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. So, if you want update the invoice you need to Void Invoice and Send the Invoice again from the Zoho CRM.
- ❑ Verify your base currency in the Zoho CRM is equal to the currency in the Stripe account.

7. Extension Uninstallation Steps

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

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

- ② Go to Setup -> Marketplace -> All -> Installed tab. All the installed Extensions will be listed.
- ② Browse for Stripe Payment Gateway Extension and click on Uninstall link.
- ② Click Okay to confirm in the confirmation pop-up that follows. The Extension will be uninstalled.