

Stripe Subscription Management Extension for Zoho CRM

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Stripe Subscription Management Extension for Zoho CRM

1. Overview

Using this extension, Zoho CRM customers can easily connect their Stripe account with the Zoho CRM and create/cancel stripe subscription and manage the corresponding stripe subscription invoices from the Zoho CRM Deals 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

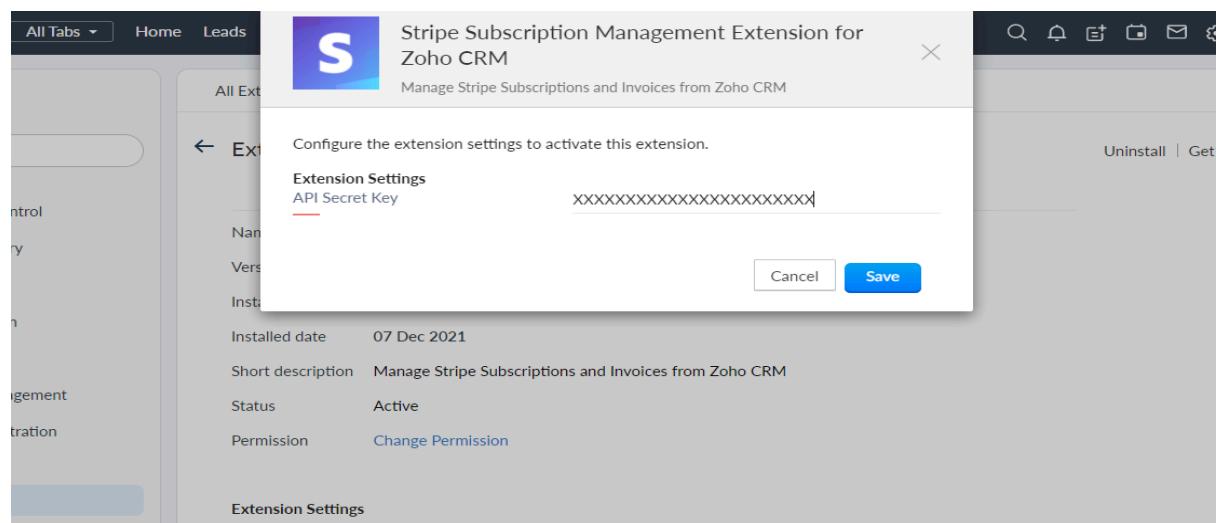
Go to Zoho Marketplace and search for “Stripe Subscription Management Extension for Zoho CRM” to locate the extension and install directly from the Marketplace. Also, you can install the Stripe Subscription Management Extension for Zoho CRM by logging in to your Zoho CRM account and follow the below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

To install the Stripe Subscription Management Extension from Zoho CRM:

- ② Go to Setup -> Marketplace -> All. By default, all the Zoho Extensions currently installed within your Zoho CRM account are listed.
- ② Go to “All Extensions” tab to view all available Extensions.
- ② Click All Extensions, browse/search for “Stripe Subscription Management Extension for Zoho CRM”.
- ② 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 is for configuring the “API Secret Key” field to connect the Zoho CRM and Stripe account.



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.

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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 stripe invoices 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:

- ② Log into your <https://dashboard.stripe.com/> with appropriate credentials.
- ② Navigate to **Developers** → **API Keys** → **Secret Key** to generate key.

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

5. Extension Data Flow

| Zoho CRM | Directions | Stripe |
|---------------------|------------|--------------|
| Contacts | -> | Customer |
| Products | -> | Products |
| Stripe Subscription | -> | Subscription |
| Invoice | <- | Invoice |
| Stripe Tax | <- | Tax |

6. Extension Functionality

6.1 Custom Module: Stripe Subscriptions

This is a custom module which is used for creating the subscription in Stripe from the Zoho CRM Deals module.

Please find the below screenshot for custom fields in the Stripe Subscription custom module.

Stripe Subscription Information

| | | | |
|----------------------------|------------------------------|----------------------------|--------------|
| Stripe Subscription Name | VIA | Stripe Subscription Owner | Talent Deers |
| Contact Name | Live Employee | Opportunity/Deal Name | VIA |
| Stripe Subscription Id | sub_1K69WFD0nf6h9PIULBpoBLHB | Stripe Subscription Status | active |
| Days Until Due(No of Days) | 5 | Collection Method | send_invoice |

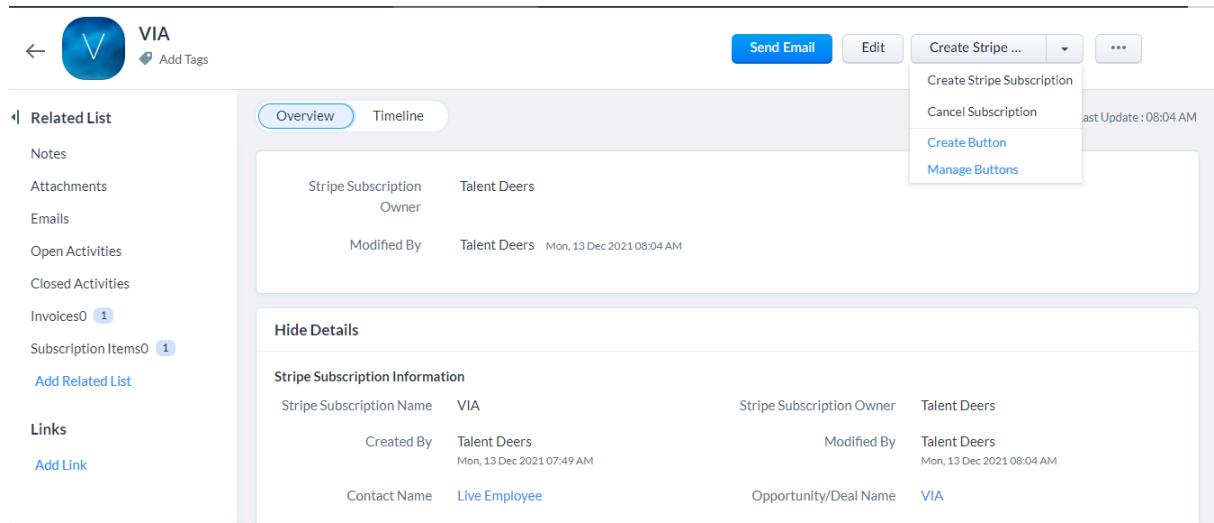
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You need to provide the contact name, Deal name and collection method. If the collection method is “send_invoice”, you need to provide the Days Until Due(no of Days) field. The “Subscription Stripe Id” and “Stripe Subscription Status” will be automatically updated after creating the subscription.

If we set the “Collection Method” is “charge Automatically” the Stripe will attempt to pay this subscription at the end of the cycle using the default source attached to the customer. When the “Collection Method” is “send_invoice”, Stripe will email your customer an invoice with payment instructions. On leaving the collection method field empty the system will consider “charge Automatically” as default.

6.2 Custom Buttons: Stripe Subscriptions

In the Stripe Subscription custom module, you have 2 buttons. First one is Create Stripe Subscription and another one is Cancel the created subscription. After creating the subscription, “Subscription Stripe Id” and “Stripe Subscription Status” will be automatically updated in the subscription record.



The screenshot shows the Zoho CRM interface for a Stripe Subscription record. The main view displays basic information: Stripe Subscription Owner (Talent Deers), Modified By (Talent Deers, Mon, 13 Dec 2021 08:04 AM). Below this is a 'Hide Details' section. A context menu is open on the right, listing 'Create Stripe ...' (with a dropdown for 'Create Stripe Subscription' and 'Cancel Subscription'), 'Create Button', and 'Manage Buttons'. The menu also shows the last update time as '08:04 AM'. On the left, a sidebar shows related lists for Notes, Attachments, Emails, Activities, Invoices (0), and Subscription Items (0). Buttons for 'Send Email', 'Edit', and a three-dot menu are also visible.

6.3 Custom Module: Stripe Subscription Item Module

This is a child custom module which is used for creating the subscription line items under the Stripe Subscription record in the Zoho CRM.

Please find the below screenshot for custom fields in the Stripe Subscription Item custom module.

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Edit Stripe Subscription Item [Edit Page Layout](#)

[Cancel](#) [Save and New](#) [Save](#)



Stripe Subscription Item Information

| | | | |
|-------------------------------|--------------------|--------------------------------|--------------|
| Stripe Subscription Item Name | VIA-PROD-1 | Stripe Subscription Item Owner | Talent Deers |
| Select Subscription | VIA | Select Product | VIP Product |
| Recurring Interval | day | Recurring Interval Count | 2 |
| Quantity | 2 | Unit Amount | \$ 25 |
| Zoho Subscription Id | 471720400002979108 | Select Stripe Tax | |
| Tax Percentage | | | |

You need to select the Subscription and Product and provide the Recurring interval, Recurring Interval count, Quantity field and if tax is needed, please select the Stripe Tax field. After saving the record, the value of Unit Amount, Zoho Subscription Id and Tax Percentage will be updated automatically.

6.4 Custom Module: Stripe Tax

This is a custom module which is used for syncing the available Tax information from Stripe system to Zoho CRM. This sync will be automatically run one time after installing the extension.

Please find the below screenshot for custom fields in the Stripe Tax custom module.

Stripe Tax Image



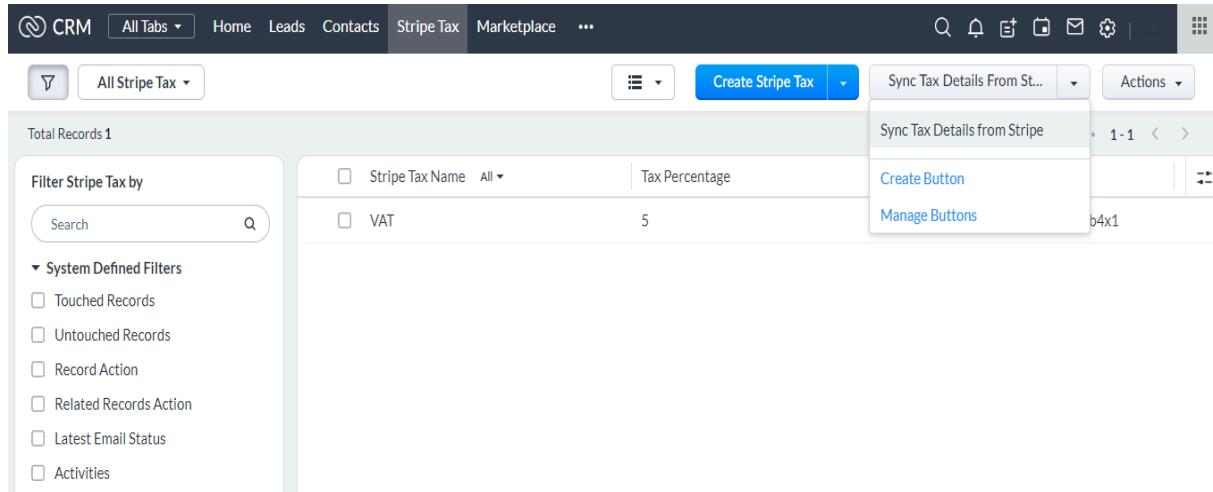
Stripe Tax Information

| | | | |
|-----------------|-----|------------------|------------------------------|
| Stripe Tax Name | VAT | Stripe Tax Owner | Talent Deers |
| Tax Percentage | 5 | Stripe Tax Id | txr_1K1BTTD0nf6h9PIUE7n9b4x1 |

6.5 Custom Buttons: Stripe Tax

In future if you want to add new taxes in your system, you need to add the Tax in the Stripe first and you need to click the “Sync Tax Details from Stripe” button in the Zoho CRM Stripe Tax module. Through this click, all the new tax information sync from Stripe to Zoho CRM.

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6.6 Custom Fields: Invoice Module

In the invoice module, we have added the following 4 fields (Stripe Subscription Id, Stripe Invoice Id, Stripe Invoice Number and Stripe Invoice Status). Once a subscription invoice is created in the Stripe, automatically that will be created as an invoice in the Zoho CRM along with the Stripe Invoice Status as an “open”. Once paid from the customer, then the Stripe Invoice Status is automatically changed to the “paid”.

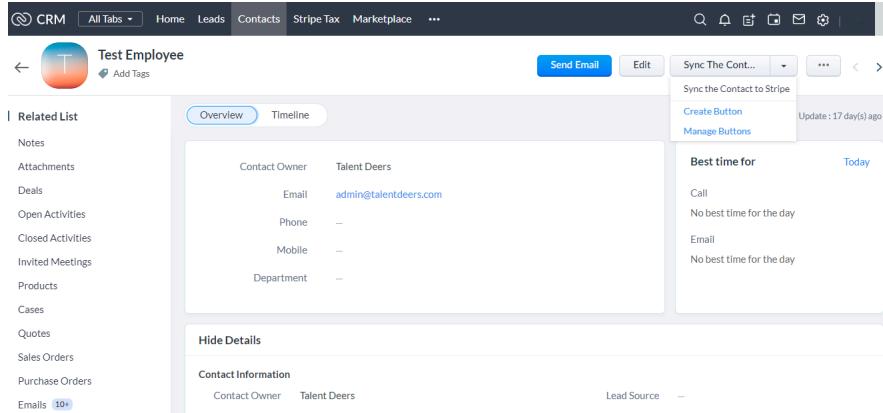
Please find the below screenshot for custom fields in the Invoice module.

| | | |
|------------------------|---|-----------------------|
| Invoice Owner | Talent Deers | Sales Order |
| Subject | Subscription Invoice for Deal - VIA (Live Employee) | Purchase Order |
| Invoice Date | Dec 13, 2021 | Due Date |
| Sales Commission | \$ | Account Name |
| Contact Name | Live Employee | Excise Duty |
| Stripe Subscription Id | VIA | Status |
| Stripe Invoice Id | in_1K69WFD0nf6h9PiUDHGdvW62 | Stripe Invoice Status |
| | | Stripe Invoice Number |

6.7 Custom Buttons: Contact

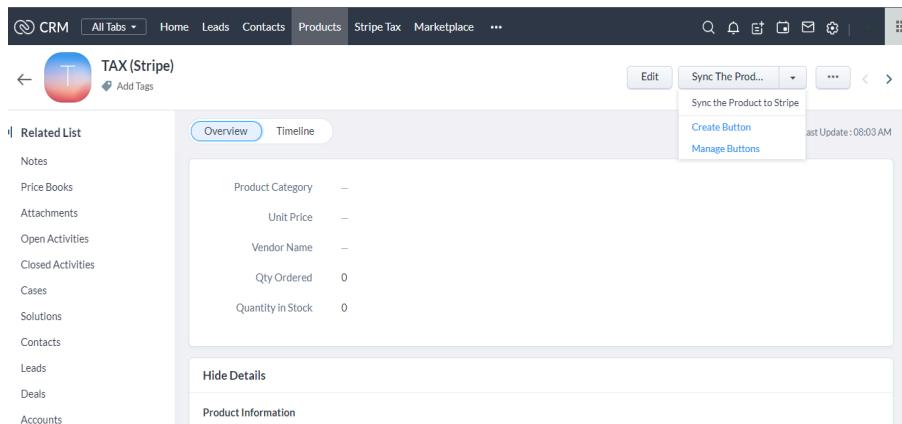
If you want to create a subscription for the existing Zoho CRM contact, you need to sync the existing contact from Zoho CRM to Stripe first through the “Sync the Contact to Stripe” button.

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6.8 Custom Buttons: Product

If you want to create a subscription for the existing Zoho CRM product, you need to sync the existing product from Zoho CRM to Stripe through the “Sync the Product to Stripe” button.



7. Possible Errors & Error Description

| # | Possible Errors | Error Description |
|---|---|--|
| 1 | Currency and interval fields must match across all plans on this subscription. Found mismatch in interval field | When creating the subscription with 2 items or more than 2 items, all the intervals (day/week/month/year) and currency must be the same. |
| 2 | Missing required param: customer. | This issue is executed when your contact is not synced to stripe. You need to go to the particular contact detail page and click the “Sync the Contact to Stripe” button before creating the subscription. |
| 3 | This customer has no attached payment source or default payment method. | When you are selecting the collection method “charge Automatically” in the Stripe Subscription module, the customer must have the payment method or source |

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| | | |
|---|---|--|
| | | information in the Stripe account. If not, you need to manually add the payment method or payment source in the customer master in the stripe account. |
| 4 | If invoice collection method is 'send_invoice', you must specify 'days_until_due'. | When you select the collection method is 'send_invoice', you must specify "Days Until Due(No of Days)" field in the Stripe subscription module. |
| 5 | Missing email. In order to create invoices that are sent to the customer, the customer must have a valid email. | The email id is missing in the Zoho CRM Contact. You need to provide the email id in the Zoho CRM Contact module before creating the subscription. |

8. Extension Limitations

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

- ☒ We can not update the subscription details from Zoho CRM. We can only create or cancel the subscription from Zoho CRM. If you want to change the subscription details, you need to delete and create a new one in the Zoho CRM.
- ☒ Verify your base currency in the Zoho CRM is equal to the currency in the Stripe account.
- ☐ For Stripe to Zoho CRM Invoice flow, the invoice will be created in the Zoho CRM if the stripe subscription is created from the Zoho CRM. Otherwise, the invoice does not sync from Stripe to Zoho CRM.
- ☐ For Invoice TAX calculations, we added the tax details as a separate line item in the Zoho CRM Invoice Product details page.

Edit Invoice [Edit Page Layout](#)

Cancel Save and New Save

Invoiced Item

| S.NO | Product Name | Quantity | List Price (\$) | Amount (\$) | Discount (\$) | Tax (\$) | Total (\$) |
|------|--------------|----------|-----------------|-------------|---------------|----------|------------|
| 1 | Test-Man | 4 | 50 | 200 | 0 | 0 | |
| | Description | | | | | | |
| 2 | TAX (Stripe) | 1 | 10 | 10 | 0 | 0 | |
| | VAT (5%) | | | | | | |

+ Add row Sub Total (\$) 210

Discount (\$) 0

9. Extension Uninstallation Steps

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

To uninstall “Stripe Subscription Management” 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 Subscription Management Extension for Zoho CRM” and click on Uninstall link.
- ② Click Okay to confirm in the confirmation pop-up that follows. The Extension will be uninstalled.