

# PayPal Subscription for Zoho CRM

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# PayPal Subscription for Zoho CRM

## 1. Extension Installation Steps

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

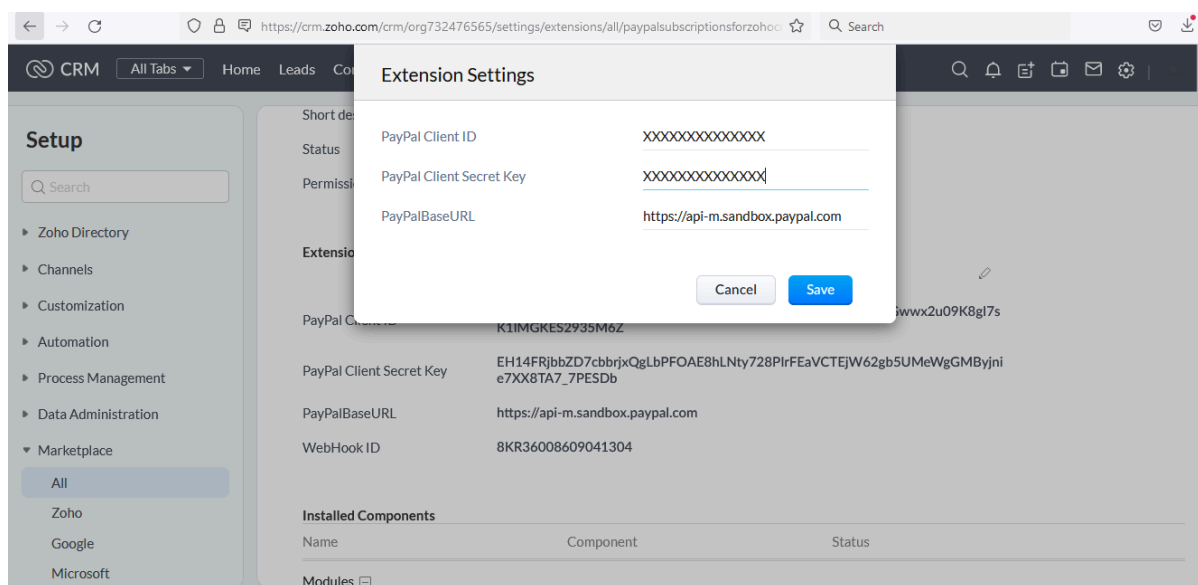
To install the PayPal Subscription Extension from Zoho CRM:

- ❑ 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 “PayPal Subscription for Zoho CRM”.
- ❑ Click the Install button. Make sure you check the “Agree to the Terms of Service” checkbox and click Install.

## 2. 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 “PayPal Client ID” and “PayPal Client Secret Key” field to connect the Zoho CRM and PayPal. If you wish to test the extension with a PayPal Sandbox account, please change the below URL in the “PayPalBaseURL”.

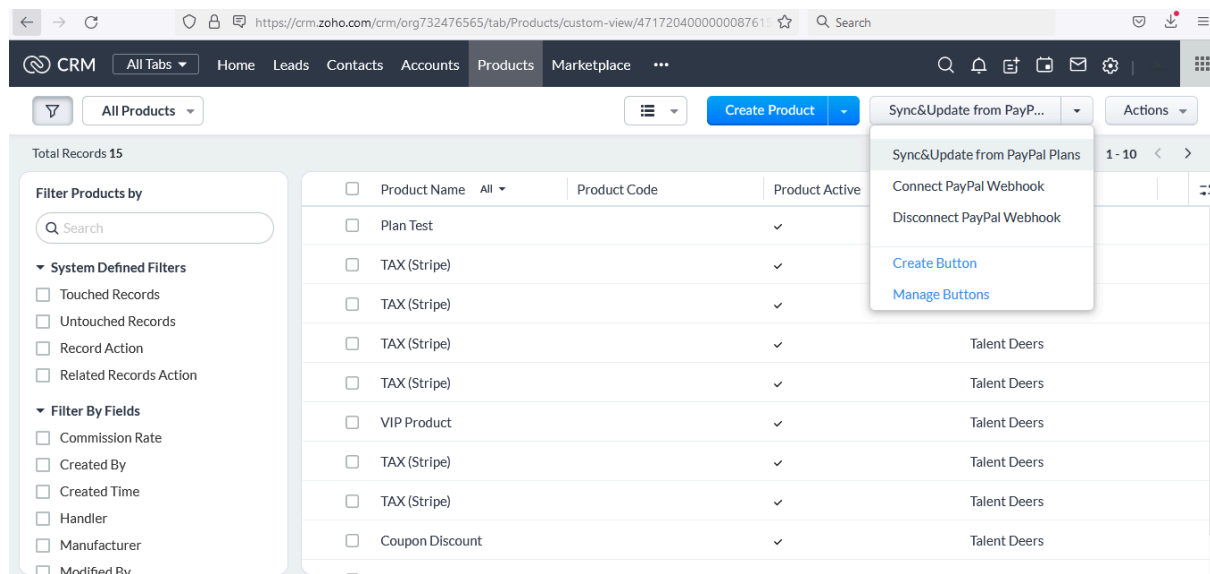
- **Live URL - <https://api-m.paypal.com>**
- **Sandbox URL - <https://api-m.sandbox.paypal.com>**



Once Save the above Extension Settings, we need to connect the CRM account with PayPal through the below steps.

- Login into Zoho CRM
- Go to Products module
- You can see the “Connect PayPal Webhook” button. Please check the below screenshot for your reference. Click the “Connect PayPal Webhook” button.

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## 3. Steps to Get the Client Id and Client Secret Key in PayPal

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

- ❑ Log in to the Developer Dashboard with your PayPal account (<https://developer.paypal.com/developer/applications>).
- ❑ Under the DASHBOARD menu, select My Apps & Credentials.
- ❑ Make sure you're on the Sandbox tab to get the API credentials you'll use while you're developing code. **After you test and before you go live, switch to the Live tab to get live credentials.**
- ❑ Under the App Name column, select Default Application, which PayPal creates with a new Developer Dashboard account. Select Create App if you don't see the default app.

### 4. Extension Data Flow

Zoho CRM	Directions	PayPal
Products	<-	Plans
Deals	->	New Subscription
Deals	<-	New Subscription
Deals Related List(PayPal Transactions)	<-	Subscription Transactions
Cancel Subscription	->	Subscription Update
Pause and Activate Subscription	->	Subscription Update

### 5. Extension Functionality

#### 6.1 Custom Buttons: Products : Connect PayPal Webhook

When setting up the PayPal extension, we need to create the webhook in PayPal. So, we need to click the “Connect PayPal Webhook” button in the Products module.

#### 6.2 Custom Buttons: Products : Disconnect PayPal Webhook

After testing the extension with sandbox or changing the paypal account through PayPal Client Id and Client Secret, you need to disconnect the webhook in the PayPal account. Once you disconnect using the “Disconnect PayPal Webhook” button in the Product module, you can go and change the Secret Key and Client Id in the extension page.

#### 6.3 Custom Buttons: Products : Sync & Update from PayPal Plans

Once completed the extension setup, if you have any historic plan available in the PayPal Account, you can click the “Sync & Update from PayPal Plans” button to sync the plans from PayPal and those plans are created as a “Products” in the Zoho CRM. If you don’t have any historic plans, you don’t need to sync. Any new PayPal plans created in the PayPal will be created as a Product in the Zoho CRM automatically.

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## 6.4 Custom Buttons: Deals: Create PayPal Subscription

You can create the PayPal subscription from your Zoho CRM Deals module. Once a subscription is created, the “PayPal Approval URL” field will be updated. You need to create a workflow to send the email or SMS to your client with this “PayPal Approval Email”. Once your customer subscribes, the subscription will be changed to “Active” in the Zoho CRM Deals module.

Please follow the below steps to automate your email through workflows.

<https://help.zoho.com/portal/en/kb/crm/automate-business-processes/workflow-management/articles/workflow-for-emails>

## 6.5 Custom Buttons: Deals: Cancel PayPal Subscription

Once synced the PayPal Subscriptions from the PayPal, you can manage the PayPal subscription from Zoho CRM. You can click the “Cancel PayPal Subscription” in the Zoho CRM Deals module to cancel the subscription in the PayPal.

## 6.6 Custom Buttons: Deals : Pause PayPal Subscription

Once synced the PayPal Subscriptions from the PayPal, you can manage the PayPal subscription from Zoho CRM. You can click the “Pause PayPal Subscription” in the Zoho CRM Deals module to pause the subscription in the PayPal.

## 6.7 Custom Buttons: Deals: Activate Paused Subscription

Once synced the PayPal Subscriptions from the PayPal, you can manage the PayPal subscription from Zoho CRM. You can click the “Activate PayPal Subscription” in the Zoho CRM Deals module to activate the paused/suspended subscription in the PayPal.

## 6.8 Related List: Deals: Activate Paused Subscription

You can get the transaction information about the particular paypal subscription through the Deals related list named “PayPal Transactions”. Please find the below screenshot for your reference.

The screenshot displays the Zoho CRM interface. At the top, there's a navigation bar with tabs for CRM, All Tabs, Home, Leads, Contacts, Accounts, Deals, Tasks, and Marketplace. Below this, the 'Deals' module is selected, showing a deal ID 'I-SXVA9XRRA5J'. The left sidebar lists various CRM modules like Products, Quotes, Sales Orders, etc. The main content area shows the 'PayPal Transactions' related list. It includes a table with columns: #, Date, Transaction Id, Gross, Fee, Net, and Status. A single transaction is listed with a status of 'COMPLETED'.

#	Date ▼ ▲	Transaction Id ▼ ▲	Gross ▼ ▲	Fee ▼ ▲	Net ▼ ▲	Status ▼ ▲
1	08-15-2022 19:15:24 PM	2RG1479001720281S	USD 10.50	USD 0.86	USD 9.64	COMPLETED

### 6. Extension Limitations

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

- ❓ The subscription is not synced if they created any manual subscriptions in the PayPal because of PayPal API capability issue.
- ❓ Verify your base currency in the Zoho CRM is equal to the currency in the PayPal account.

### 7. Extension Uninstallation Steps

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

To uninstall “PayPal Subscription for Zoho CRM” Extension, please follow the below steps:

- ❓ Go to Setup -> Marketplace -> All -> Installed tab. All the installed Extensions will be listed.
- ❓ Browse for “PayPal Subscription for Zoho CRM” and click on Uninstall link.
- ❓ Click Okay to confirm in the confirmation pop-up that follows. The Extension will be uninstalled.