



Zoho CRM Extension

for

PayPal



User Guide

Version 1.0

Developed By:



TABLE OF CONTENTS

1.	ZOHO CRM EXTENSION DEVELOPMENT – PROJECT OVERVIEW	3
1.1	INSTALLING THE PAYPAL EXTENSION FROM ZOHO MARKETPLACE	3
1.2	UNINSTALLING THE PAYPAL EXTENSION	5
2	ZOHO CRM EXTENSION FOR PAYPAL– FUNCTIONAL OVERVIEW	7
2.1	PAYPAL EXTENSION – LIST OF CUSTOM ZOHO CRM MODULES / FUNCTIONS	7
2.2	SETTING UP PAYPAL ACCOUNTS	8
2.2.1	<i>How to Connect Webhooks?</i>	9
2.2.2	<i>How to Revoke Webhooks?</i>	9
2.2.3	<i>How to get PayPal Credentials?</i>	9
2.3	PROCESSING ZOHO CRM INVOICE FOR PAYMENT VIA PAYPAL	12
2.4	CREATING PAYPAL INVOICE AND PROCESSING PAYMENT THROUGH PAYPAL	14
2.4.1	<i>Cancel</i>	17
2.5	ISSUE REFUND FOR INVOICE	17
2.6	UPDATE INVOICE IN PAYPAL AND ZOHO CRM	18
3	PAYMENT HISTORY MODULE: VIEWING PAYMENT DETAILS WITHIN ZOHO CRM	19

Zoho Marketplace – CRM Extension for PayPal

1. Zoho CRM Extension Development – Project Overview

PayPal offers a worldwide online payments system that supports online money transfers and serves as an electronic alternative to traditional paper methods like Checks, Cashier Check, and Money Orders. Zoho CRM is a highly popular CRM product in the SMB (Small and Medium Business) industry space and being used by multi-millions of users.

With this extension, users can easily create invoice in PayPal through Zoho CRM, Create/Process a payment in PayPal for Zoho CRM invoices. PayPal payment status and all previous PayPal payment history are shown within Zoho CRM for easy reference.

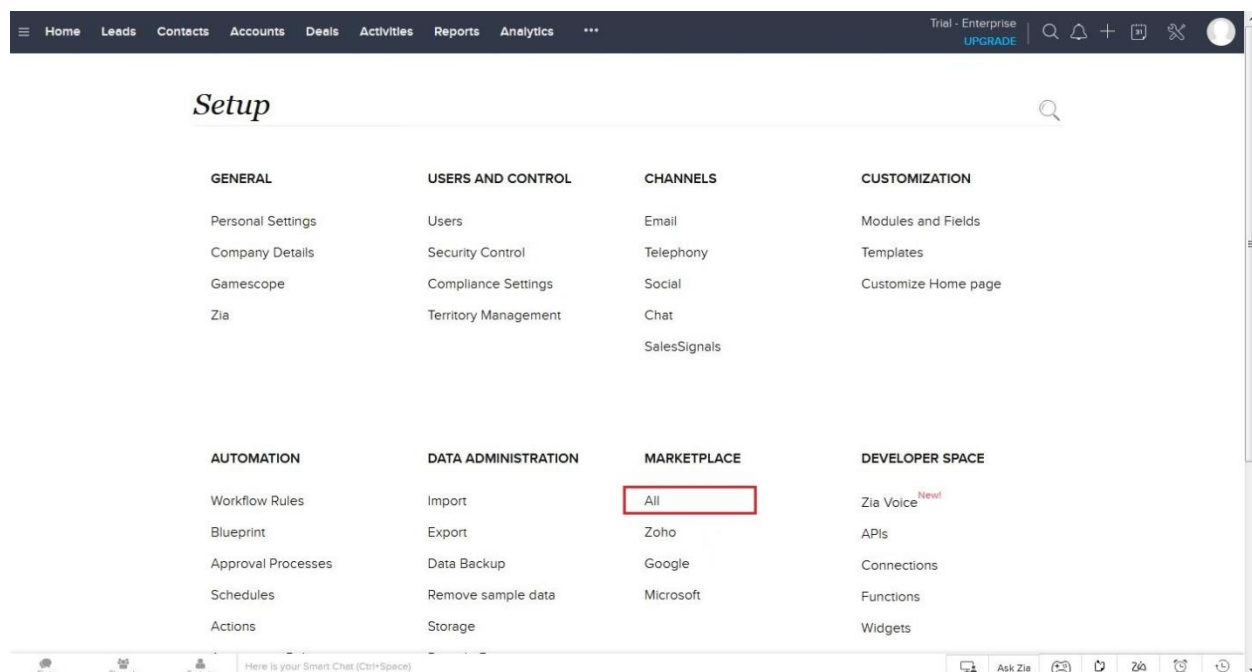
1.1 Installing the PayPal Extension from Zoho Marketplace

- Go to Zoho Marketplace at <http://marketplace.zoho.com>, search for “PayPal Extension for Zoho CRM” to locate the Extension and install directly from the marketplace, OR
- Install the extension from within your Zoho CRM account using SETUP menu as shown below.

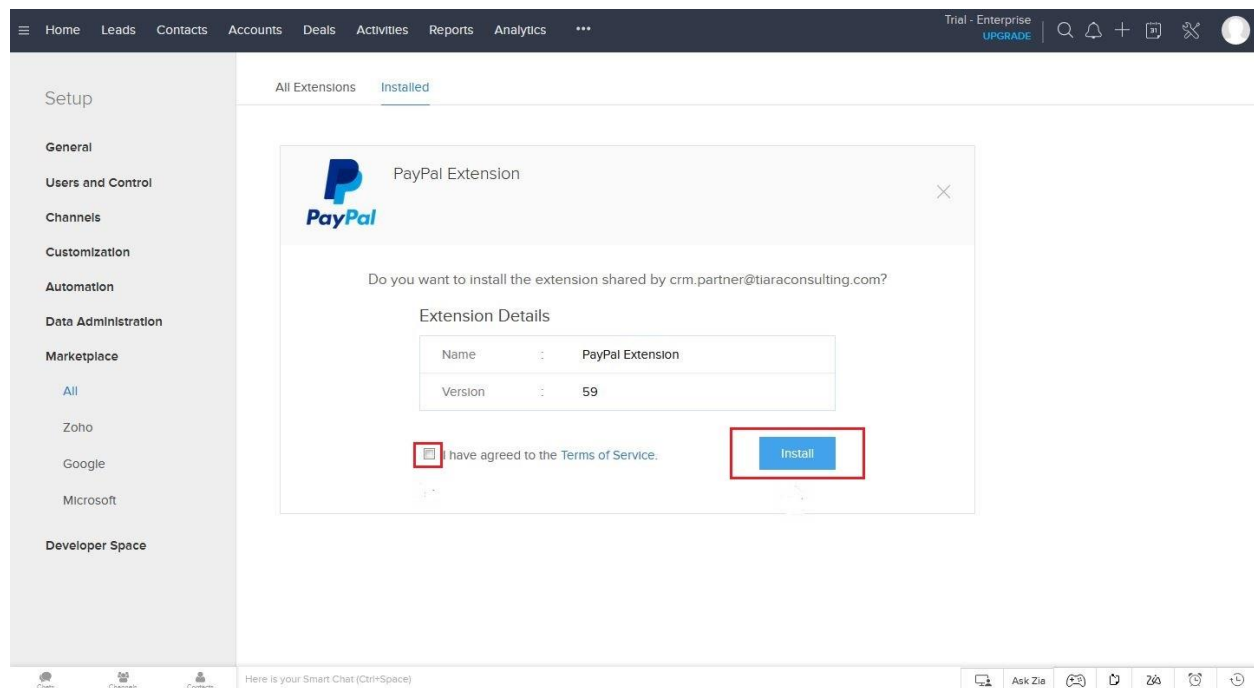
Note: PayPal Extension can be installed and used only in **Zoho CRM Enterprise Edition and above**.

To install the PayPal extension:

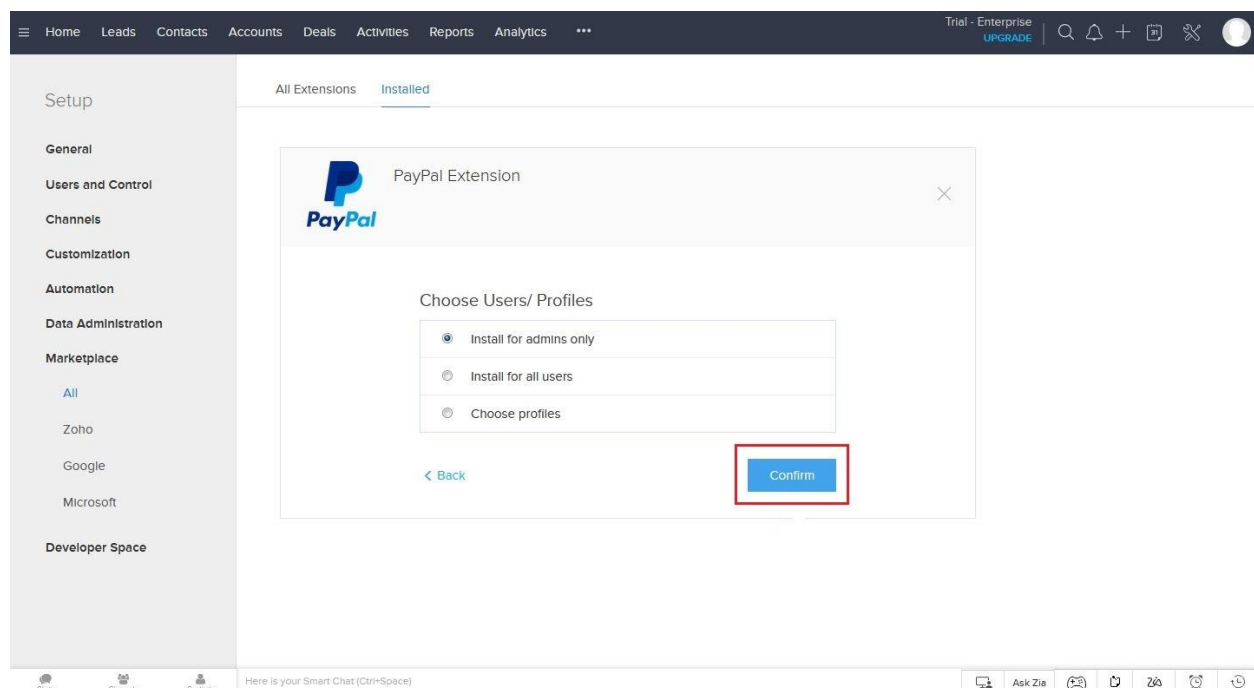
- Goto **Setup > Marketplace > All**: All the installed extensions are listed. Under **All Extensions** you can view all the extensions supported by your CRM.



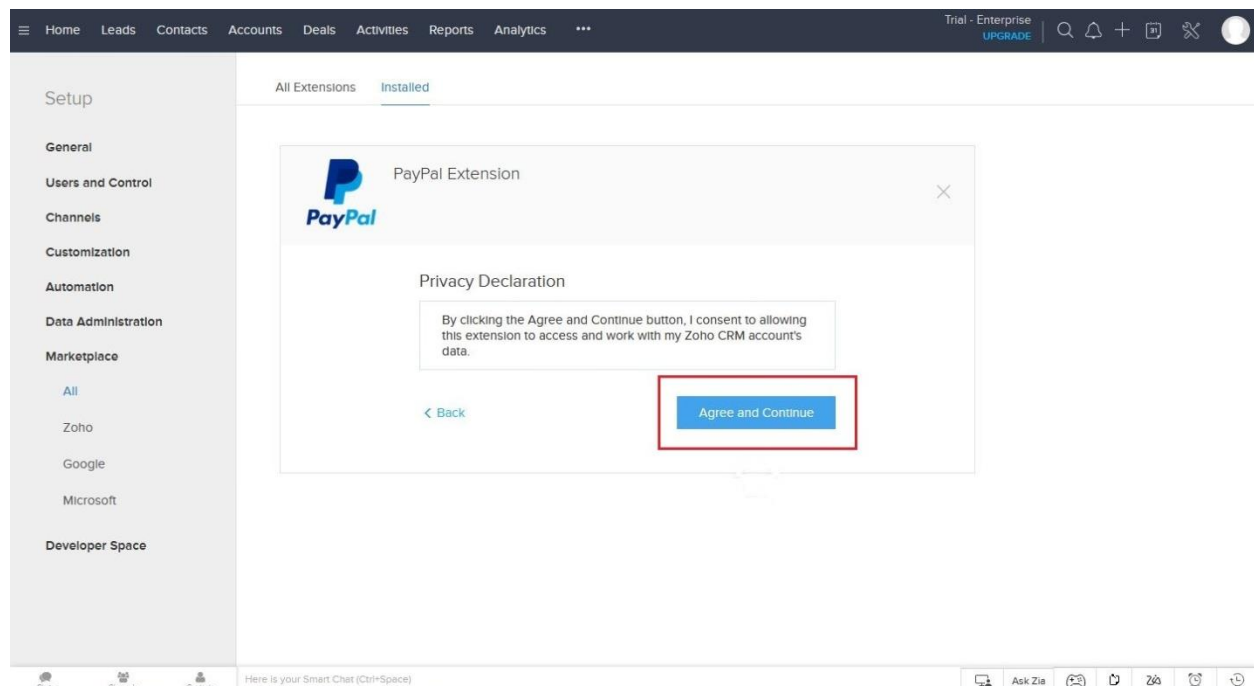
- Click **All**, browse for **PayPal**, and click it to see the extension details.
- Click **Install Now**, agree to the **Terms of Service** and click **Install**.



- Select the Users/Profiles Option if you need to install the extension only for Administrators or All Users or Users with specific profiles (E.g. Finance Manager) and click **Confirm**.



- Agree to the Privacy Declaration by clicking on **Agree and Continue**



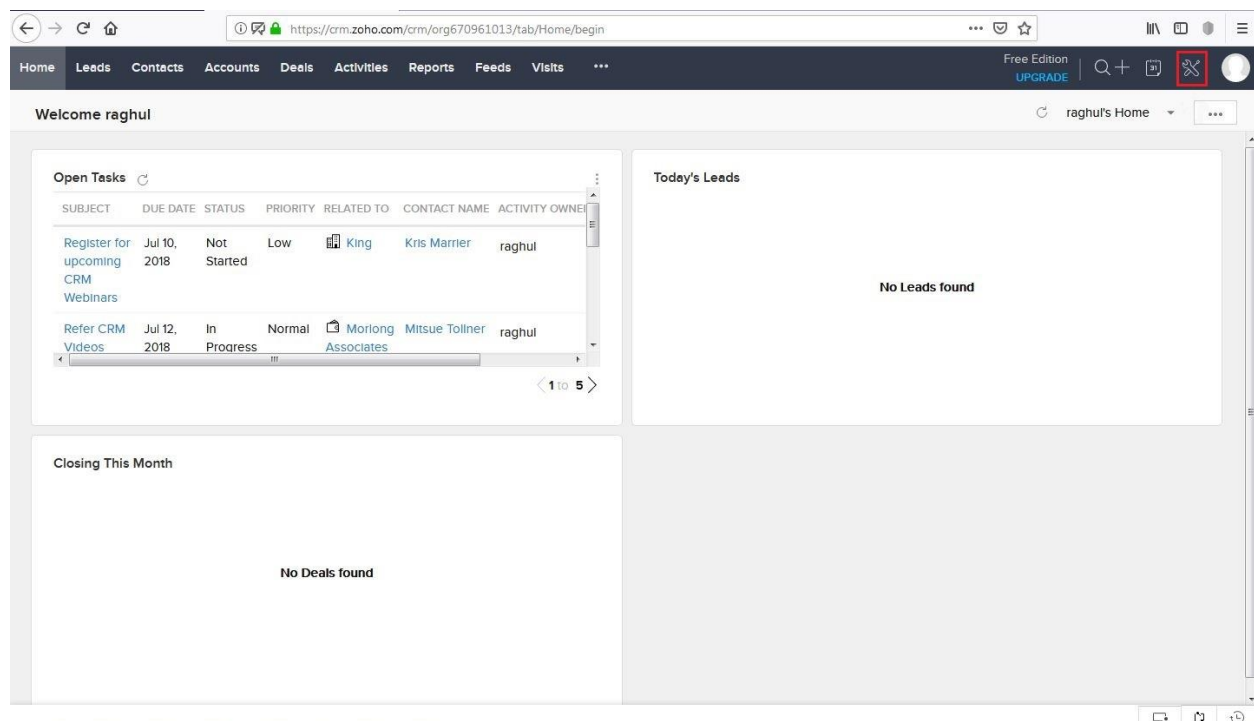
Note: Please select the default option of “Admins Only” or select “All Users” if you want the extension to be visible to all the Zoho CRM users of your organization.

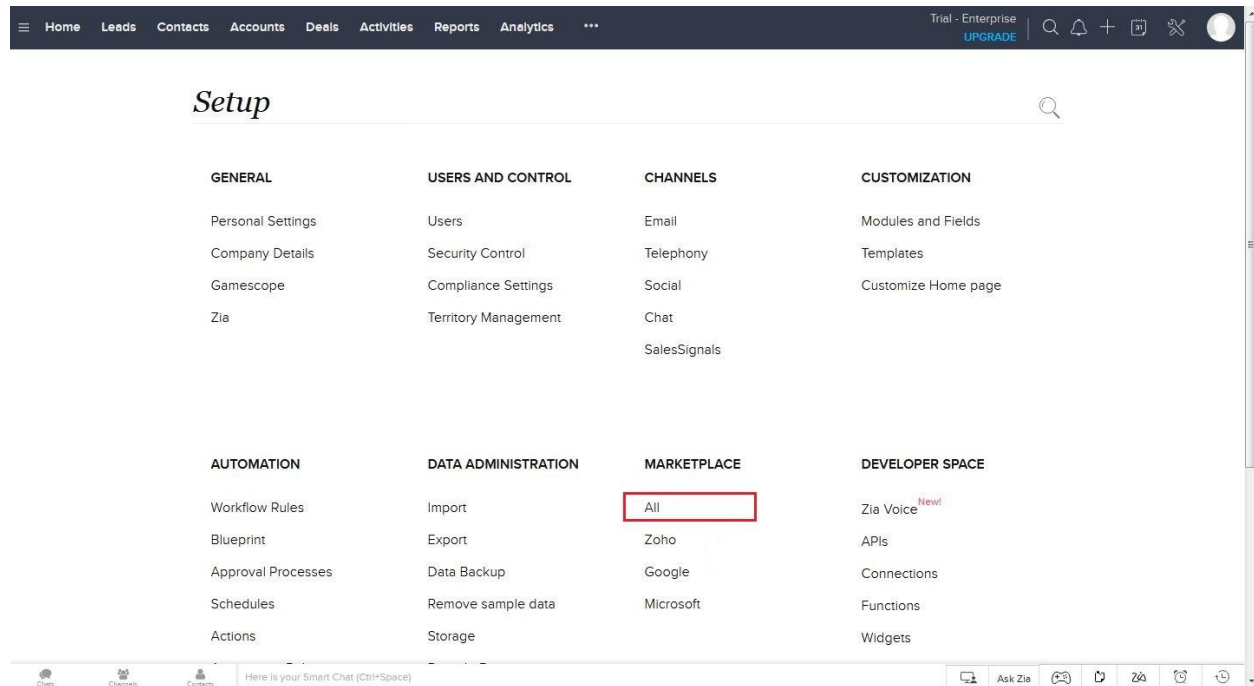
1.2 Uninstalling the PayPal Extension

You can uninstall the PayPal extension whenever you wish to. Remember that uninstalling this extension will delete all its associated data.

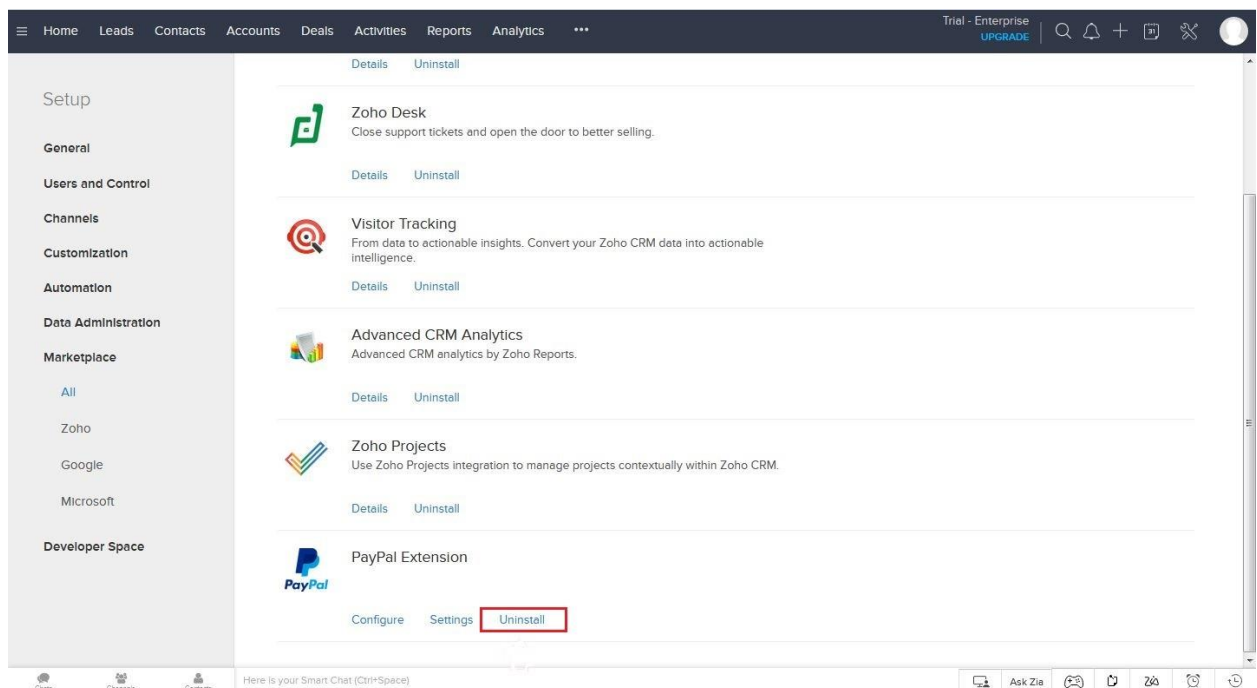
To uninstall PayPal Extension:

- Go to **Setup > Marketplace > All**. All the installed extensions will be listed.

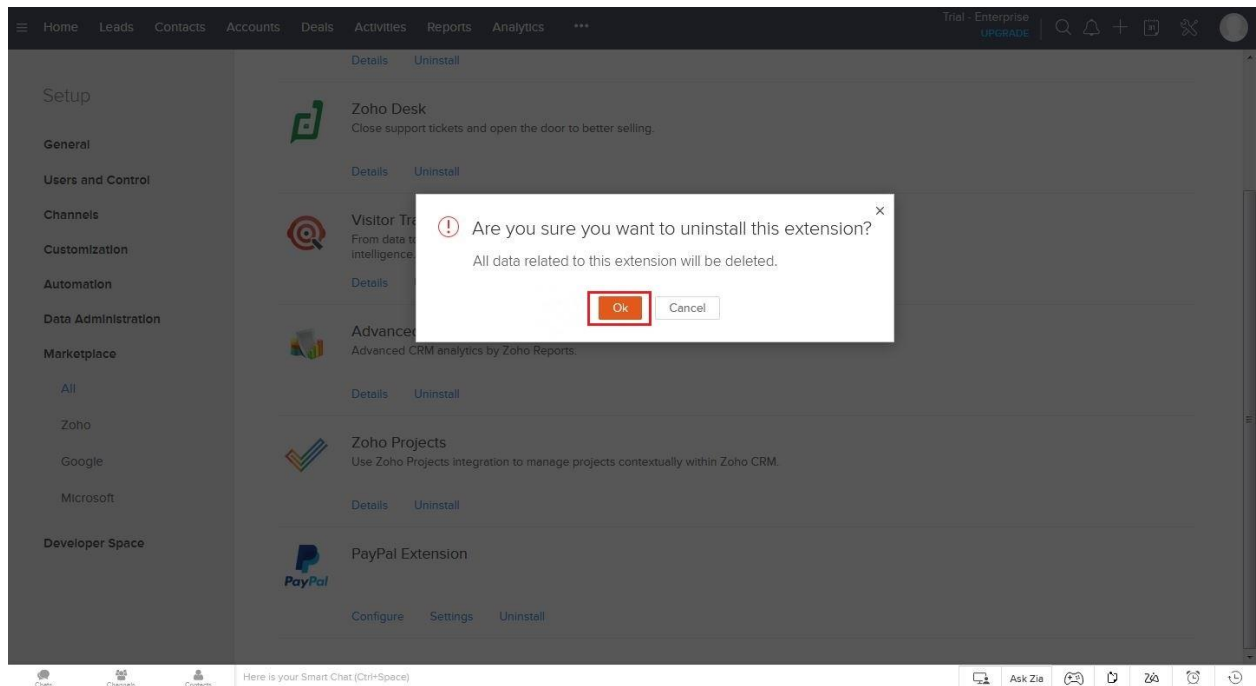




- Locate / Browse for **PayPal** Extension and click on the icon to see the extension details and a corresponding **Uninstall** link. Click the **Uninstall** button.



- Click **Okay** in the confirmation pop-up to confirm the uninstall request and the extension will be uninstalled.



2 Zoho CRM Extension for PayPal– Functional Overview

2.1 PayPal Extension – List of Custom Zoho CRM Modules / Functions

Once the Extension gets installed, a predefined set of custom modules and functions get created within the Zoho CRM account which provides all the functions offered by the extension. Following table list the custom modules created within Zoho CRM by the PayPal extension and its purpose.

No.	Zoho CRM Custom Module	Functional Description
1.	PayPal Account	<ul style="list-style-type: none"> ➤ To setup new PayPal Business Account where the customer will receive the payments. ➤ You can setup more than one PayPal Business Account within a given Zoho CRM account.
2.	Invoices – Process for Payment (Custom Function within Invoices module)	<ul style="list-style-type: none"> ➤ Once an invoice is generated within Zoho CRM, this custom button / function is used to email the Zoho CRM Invoice to end-customer with a link to pay the invoice through PayPal.
3.	Invoices – Send Invoice through PayPal (Custom Function within Invoices module)	<ul style="list-style-type: none"> ➤ Once an invoice is generated within Zoho CRM, this custom button / function is used to push the invoice into PayPal and generate a corresponding PayPal Invoice which will be automatically emailed to end-customer by PayPal.
4.	Payment History	<ul style="list-style-type: none"> ➤ All processed payments through PayPal are shown. ➤ If PayPal Invoice is generated, PayPal Invoice # is shown in this module and also in the Invoices module.

2.2 Setting up PayPal Accounts

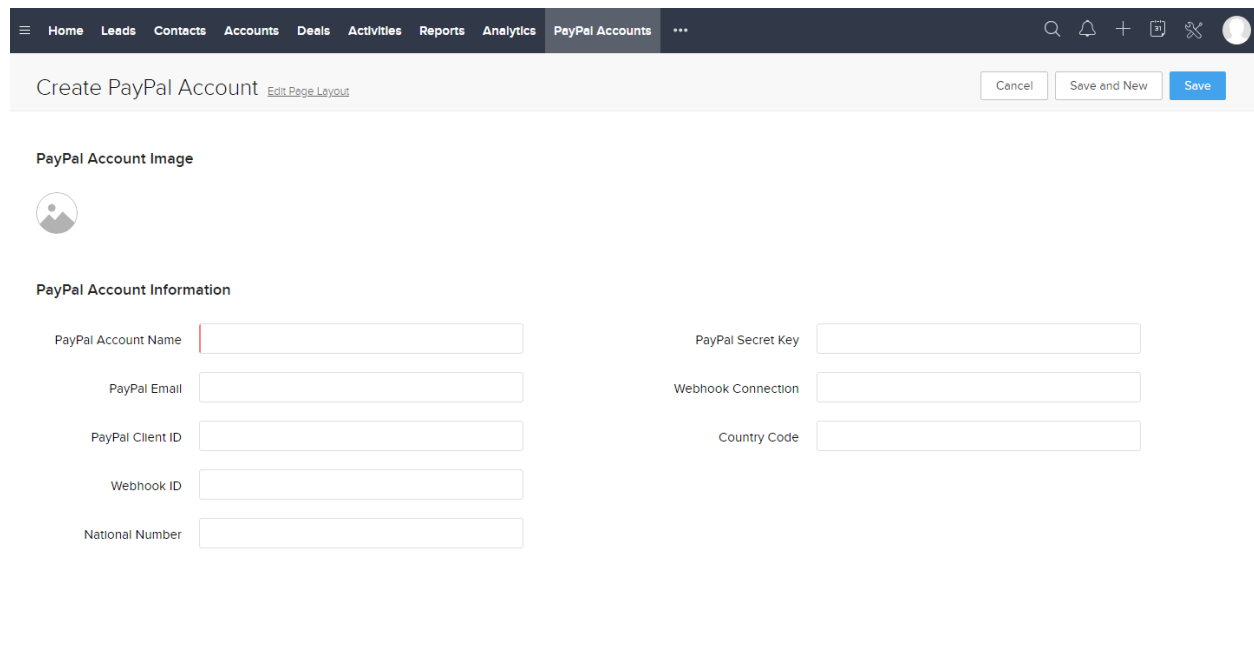
After installing the extension, the user needs to first setup the PayPal Business account within Zoho CRM. This is the PayPal Account where all the payments will be received and it has to be Business / Merchant Account only. Please note that you can setup more than one PayPal Business Account within a particular Zoho CRM account and at the time of sending invoice for payment, the user can choose the particular account to be used for processing the payment.

Following are the steps to be followed for setting the PayPal Business Account within Zoho CRM.

Step 1: Select **PayPal Account** custom module within Zoho CRM. By default, you will be shown the **Create PayPal Account** button as shown below.



Step 2: Click the **Create PayPal Account** button to see the below screen.



The screenshot shows the 'Create PayPal Account' form in Zoho CRM. The form has a header bar with navigation links and a search icon. Below the header, there is a section for 'PayPal Account Image' with a placeholder icon. The main section is titled 'PayPal Account Information' and contains several input fields for account details.

PayPal Account Information	
PayPal Account Name	PayPal Secret Key
PayPal Email	Webhook Connection
PayPal Client ID	Country Code
Webhook ID	
National Number	

Step 3: Please enter suitable values for the following fields and click **SAVE** button.

- **PayPal Account Name:** Unique name to identify the particular PayPal Business Account
- **PayPal Email:** Enter the login email address of the PayPal Business account being setup.
- **PayPal Client Id:** You need to create a new App using PayPal in order to get the Client Id (Please refer to section 2.3 for instructions on how to get PayPal credentials).
- **PayPal Secret Key:** You will be able to get the secret key while getting the Client Id.
- **National Number:** your phone number
- **Country Code:** your country code
- **Webhook Subscription:** Check whether your merchant account is connected to webhook updates.
- **Webhook ID:** The ID of webhook which are connected to it

Note: Only when you connected to webhooks you will **get real-time updates** for the Zoho CRM.

2.2.1 How to Connect Webhooks?

- Provide your basic info (PayPal Account Name, Email, ClientID and Secret Key).
- Click **Connect Webhook** button. Once you have clicked it, the webhook ID and Subscription status will be automatically updated to your particular PayPal Account Module.

Note: Webhooks are **Mandatory** for setting up your PayPal account to Zoho CRM

2.2.2 How to Revoke Webhooks?

- Select the PayPal Account in PayPal Account module.
- In the Details Page, Click **Revoke Webhook** button.

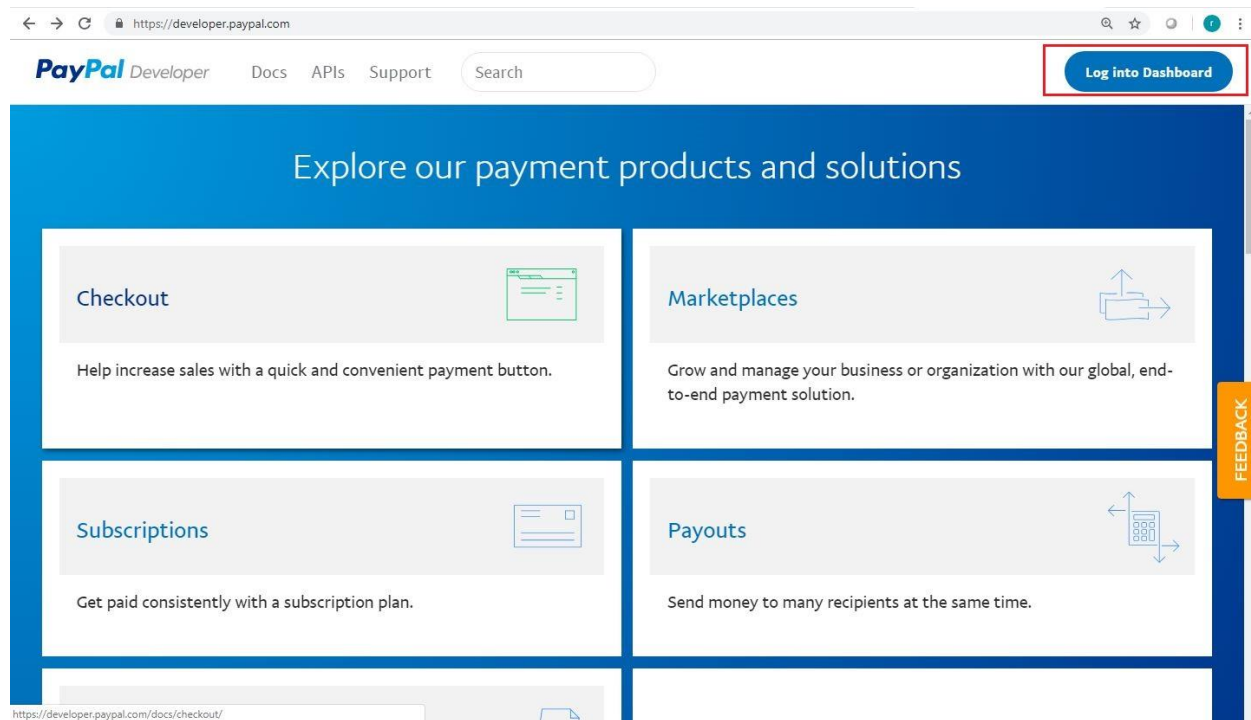
Note: If you revoke the Webhook, no status or summary will be updated for the particular merchant account.

2.2.3 How to get PayPal Credentials?

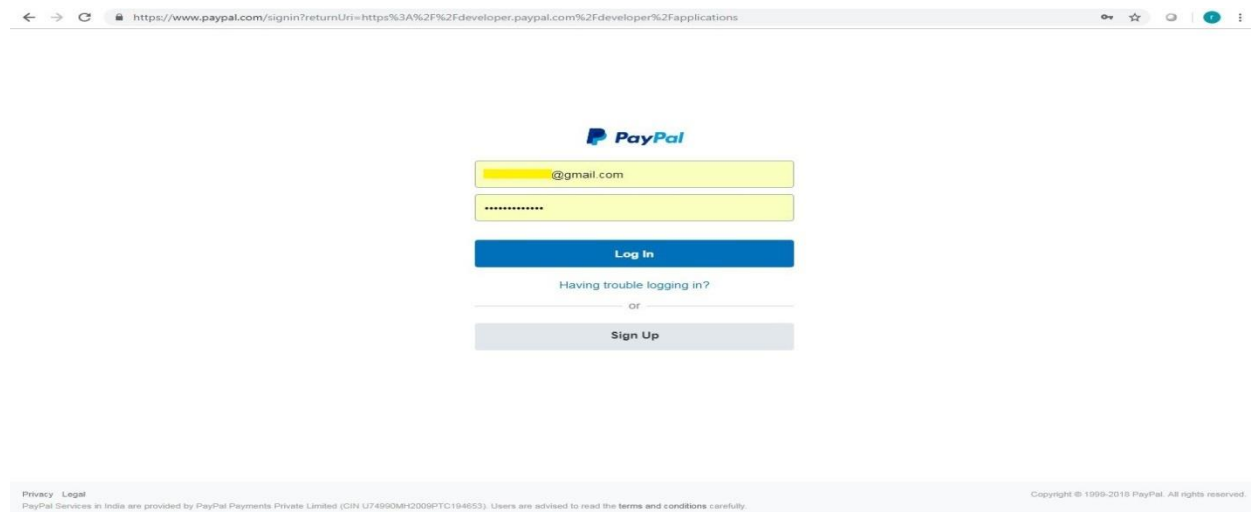
PayPal Credentials is one of the important things in this PayPal Extension. So above credentials are important for integrating PayPal.

To get the ClientID, Secret Key:

- Login in <https://developer.paypal.com>



- Enter your PayPal login and password



- Click on My Apps & Credentials

My Apps & Credentials

Express Checkout via Braintree SDK - Live Account

Manage your account settings for your live Braintree SDK account.

- View and Add currencies
- Reset access token
- Configure webhooks (coming soon)

[Hide Details](#)

Live Account

[iamdhiva95@gmail.com](#) LIVE

Express Checkout via Braintree SDK - Sandbox Accounts

- Click on Create App under REST API apps.

REST API apps

Create an app to receive REST API credentials for testing and live transactions.

Note: Features available for live transactions are listed in your [account eligibility](#).

[Create App](#)

[Hide Details](#)

- Fill on the form and Click Create App
- Then you can click on the App that you created
- Click on the Live on the top right corner

- You can see the **client ID** details
- When you click **Show** which is below the secret key, you can get the **Secret key** details

Created	Secret	Status	Action
Sep 15, 2018	XXXXXXXXXX Secret Key XXXXXXXX	Enabled	...

2.3 Processing Zoho CRM Invoice for Payment via PayPal

The first major function offered by the Extension is to allow Zoho CRM User to create an invoice and email the invoice to the end-customer with a link to pay via PayPal. Once the end-customer clicks the link, they will be asked to log into their own PayPal account and after they enter the payment details, the payment will be automatically credited into the PayPal Business Account used by the Zoho CRM User. This will help Zoho CRM User to get payments quickly via PayPal.

Following are the steps for creating an invoice in Zoho CRM and processing payment via PayPal:

Step 1: Go to Invoices module and click “Create New Invoice” or “+” button.

Step 2: Enter the invoice subject, date, due date and select the Account Name (Customer Name).

Step 3: Select the Contact Name to whom the invoice needs to be sent for payment. (**Note:** This contact should be defined in Zoho CRM with a **valid email address** or else it won’t work.)

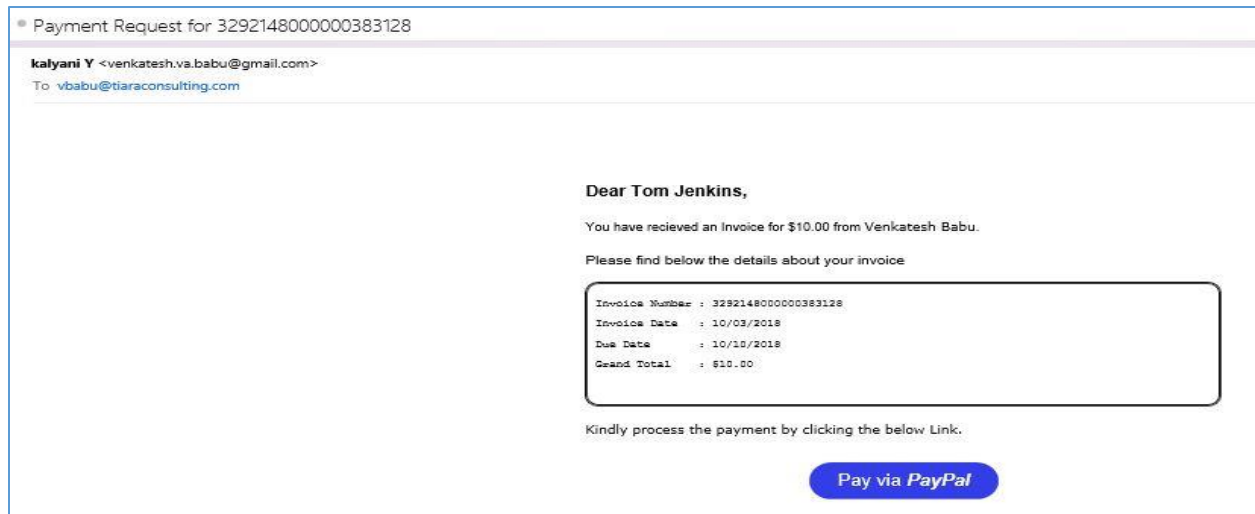
Step 4: Add the invoice line items and click **SAVE** button when invoice is ready to be generated.

Step 5: Once invoice gets generated, you will get a **Process for Payment** button option. Click it.

Step 6: A pop-up window will appear where you need to select the PayPal Business Account from the drop-down menu shown within the pop-up window and click **Proceed** button.

Upon successful processing, User will get a notification message as shown in screenshot below:

The end-customer will now receive an email with the Zoho CRM as an attachment and with a button “Pay via PayPal” as shown below. (**Note:** Attaching Zoho CRM Invoice in the email is still under development and will be available in the next beta version)



The end-customer will click the “Pay via PayPal” button to pay the invoice using their PayPal account and the amount gets credited directly into Zoho CRM User’s PayPal Business Account.

2.4 Creating PayPal Invoice and Processing Payment through PayPal

The extension offers another easy way for Zoho CRM user to process payment from their end-customer. Instead of emailing the Zoho CRM invoice with a link to **Pay via PayPal**, Zoho CRM User has an alternate option to push the Zoho CRM invoice into PayPal and generate an equivalent PayPal Invoice which will then be automatically emailed to the end-customer by PayPal with a link to **View and Pay Invoice**. The end-customer can view the PayPal Invoice in a separate browser and pay the PayPal invoice by clicking a Pay button above the invoice. The payment status is updated back in Zoho CRM and details can be viewed in **Payment History** module.

Following are the steps for creating an invoice in Zoho CRM, send to PayPal to generate a PayPal invoice and processing payment via PayPal:

Step 1: Go to Invoices module and click “Create New Invoice” or “+” button.

Step 2: Enter the invoice subject, date, due date and select the Account Name (Customer Name)

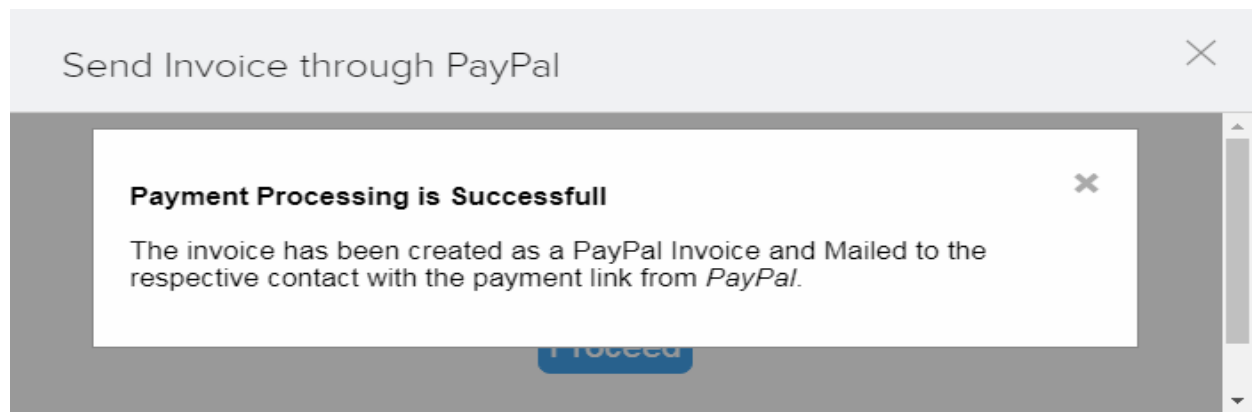
Step 3: Select the Contact Name to whom the invoice needs to be sent for payment. (**Note:** This contact should be defined in Zoho CRM with a **valid email address** or else it won’t work.)

Step 4: Add the invoice line items and click **SAVE** button when invoice is ready to be generated.

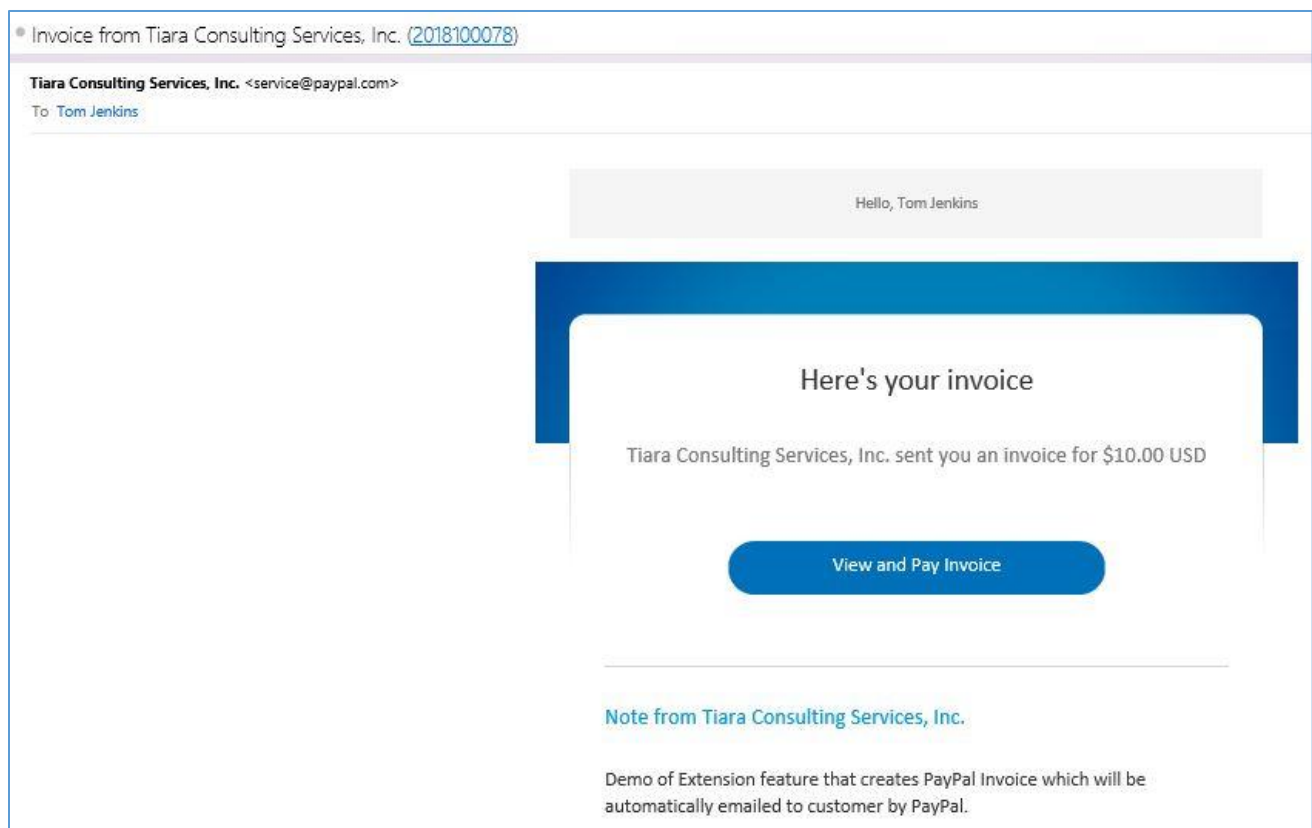
Step 5: Once invoice gets generated, you will get a **Send Invoice through PayPal** button option in the button drop down as shown below. Click the **Send Invoice through PayPal** button.

Step 6: A pop-up window will appear where you need to select the PayPal Business Account from the drop-down menu and click **Proceed** button.

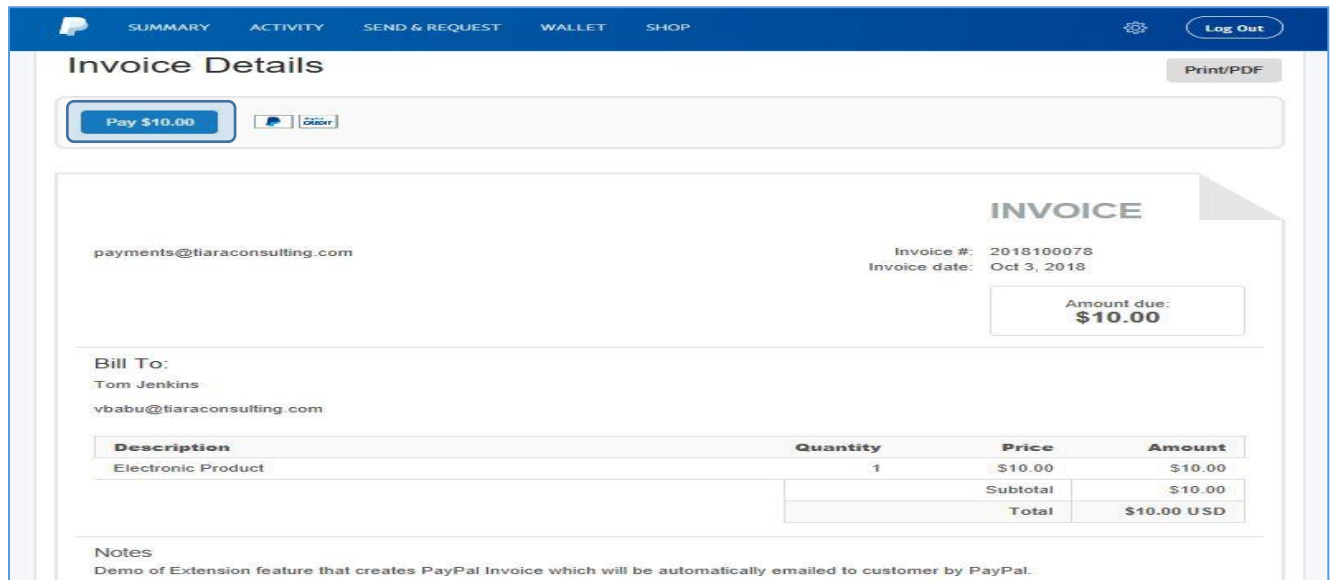
Upon successful processing, you will get a notification message as shown in screenshot below:



Now the PayPal invoice gets created and in addition, PayPal will automatically email the PayPal invoice to the end-customer with a **View and Pay Invoice** button as shown below.



The end-customer can click the **View and Pay Invoice** button to view the PayPal Invoice and see all the invoice details as it will be shown within Zoho CRM – see sample screenshot below.



payments@tiaraconsulting.com

Invoice #: 2018100078
Invoice date: Oct 3, 2018

Amount due: \$10.00

Bill To:
Tom Jenkins
vbabu@tiaraconsulting.com

Description	Quantity	Price	Amount
Electronic Product	1	\$10.00	\$10.00
Subtotal			\$10.00
Total			\$10.00 USD

Notes
Demo of Extension feature that creates PayPal Invoice which will be automatically emailed to customer by PayPal.

End-Customer will click the **Pay** button to make the payment using their PayPal account and the amount gets credited directly into Zoho CRM User's PayPal Business Account.

2.4.1 Cancel

It is possible to cancel the Invoice which has been sent to the end user using **Cancel** option.

Steps to cancel the already sent invoice through PayPal:

Step 1: Go to the **Payment History** module.

Step 2: Click on **Cancel** button that is available in each record.

Note: Only the Zoho and PayPal Invoice can be cancelled.

2.5 Issue Refund for Invoice

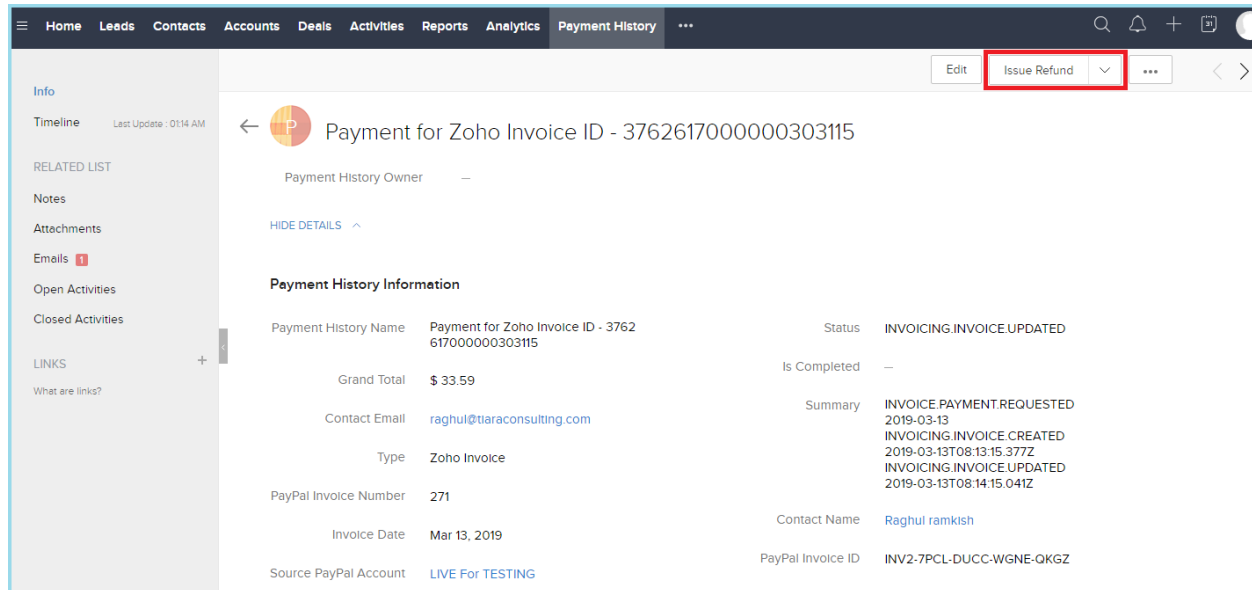
It is possible to Issue Refund of the Invoice which has been paid from the end user using **Issue Refund** option in **Payment History** module.

Steps to Refund the Paid Invoices:

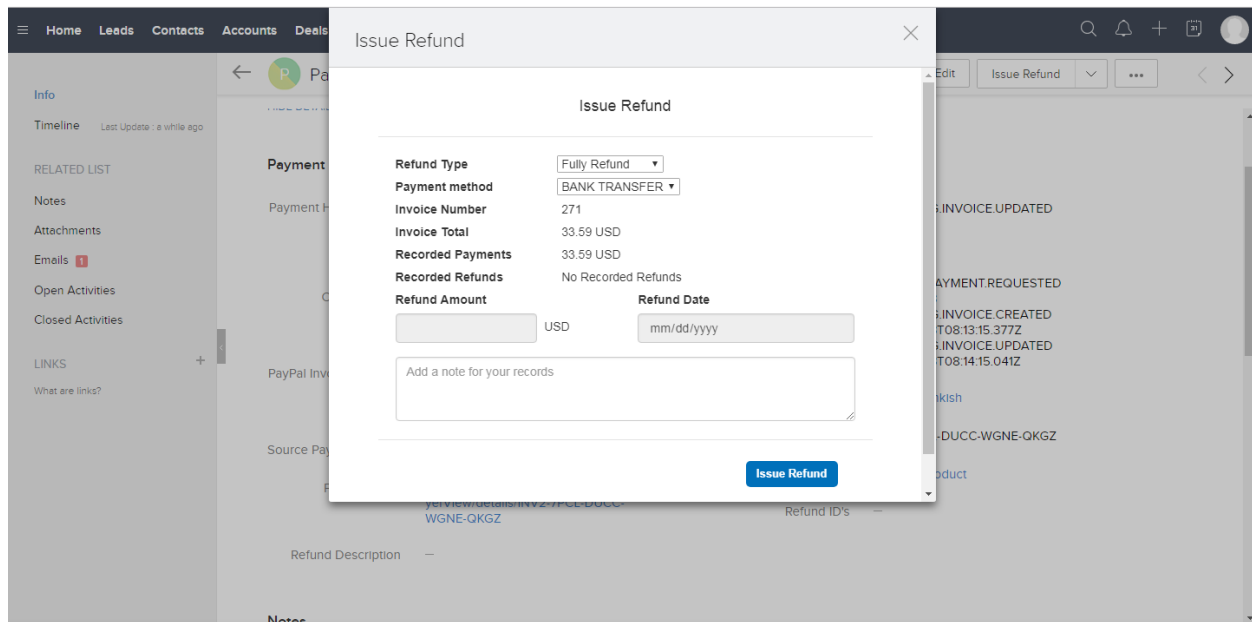
Step 1: Go to the **Payment History** module.

Step 2: Select the record transaction you want to refund.

Step 3: Click on **Issue Refund** button that is available on the top right corner of the view page.



Step 4: Select your payment method and refund type to proceed with the issue refund.



Note: Issue Refund functionality is available only to the paid Invoices.

2.6 Update Invoice in PayPal and Zoho CRM

With this functionality, the user can update the invoice in CRM and the same information will be updated back to the PayPal.

Steps to Update the Invoices:

Step 1: Go to the **Invoice** module.

Step 2: Select the Invoice that you want to update. Edit the Invoice and enable the checkbox “Update Invoice in PayPal” to update the newly added information in PayPal.

Step 3: Click Save to save the changes in the Invoice.

Note: Without enabling the check box “Update Invoice in PayPal” the newly added changes will not get updated in PayPal.

Please see the screenshot below for any reference.

The screenshot displays the Zoho CRM Invoice form. Key fields include:

- Due Date:** Mar 9, 2019
- Excise Duty:** —
- Sales Commission:** —
- Status:** Created
- Account Name:** Test
- Created By:** Zoho Developer (Thu, 7 Mar 2019 09:07 PM)
- Contact Name:** Raghu ramkish
- Modified By:** Zoho Developer (Mon, 11 Mar 2019 01:58 AM)
- PayPal Invoice ID:** INV2-XFYK-NNF7-J92W-MZKA
- PayPal Invoice Number:** 262
- Update Invoice in PayPal:** ☒ (highlighted with a red box)

Address Information:

Billing Address	Shipping Address
Billing Street: doe	Shipping Street: John
Billing City: TUCSON	Shipping City: TUCSON
Billing State: Arizona	Shipping State: Arizona
Billing Code: 85705	Shipping Code: 85705
Billing Country: US	Shipping Country: US

A "Locate Map" button is visible next to the address information. A scroll button is located at the bottom right of the form.

3 Payment History Module: Viewing Payment Details within Zoho CRM

Payment History is a custom module created by the extension that will allow Zoho CRM users to view all the payments received via PayPal as shown in the screenshot below.

The screenshot shows the Zoho CRM interface with the "Payment History" module selected. The table lists the following payments:

PAYMENT HISTORY NAME
Payment for Zoho Invoice No - 329214800000383154
Payment for Zoho Invoice No - 329214800000383128

At the bottom of the table, it shows "Total Count: 2" and "10 Records Per Page".

Zoho CRM Users can view details of each payment by clicking the **Payment History Name** link. The payment details screen will look like below:

Payment History Information	
Payment History Name	Payment for Zoho Invoice ID - 37 62617000000198152
Status	INVOICE.PAYMENT.REQUESTED
Grand Total	\$ 5.56
Is Completed	—
Contact Email	priyaappar14@gmail.com
Summary	INVOICE.PAYMENT.REQUESTED 2019-03-05
Type	Zoho and PayPal Invoice
Contact Name	Raghul
PayPal Invoice ID	#010
PayPal Invoice Number	INV2-N3R7-F62T-RWA3-VER6
Invoice Date	Mar 5, 2019
Invoice Name	Apple
Source PayPal Account	LIVE For TESTING
Payment Link	https://www.paypal.com/invoice/payerView/details/INV2-N3R7-F62T-RWA3-VER6

Note: If the PayPal invoice is created then the PayPal Invoice Number is shown in the PayPal Invoice Id field. Please see the screenshot above for reference.
