



Zoho CRM Extension

DEVELOPER GUIDE



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1 Overview

PayPal offers a global online payments system that supports money transfers and serves as an electronic alternative to traditional paper methods like checks, cashier checks, and money orders. Zoho CRM is a popular CRM product for small and medium-sized business and is used by millions of users.

With this extension, users can easily create PayPal invoices through the Zoho CRM, and create/process PayPal payments for Zoho CRM invoices. The PayPal payment status and all previous PayPal payment history are shown within the Zoho CRM for easy reference.

1.1 Install the PayPal Extension

1. To install the PayPal extension directly from the Zoho Marketplace, go to <http://marketplace.zoho.com>, and search for “PayPal extension for Zoho CRM”.

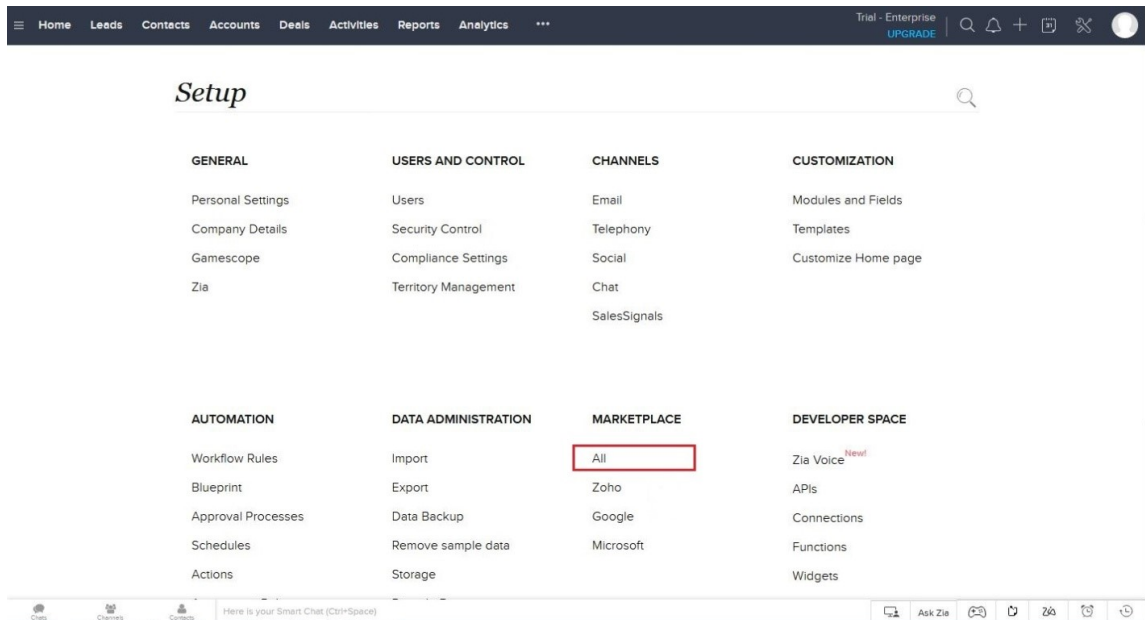
OR

2. Install the extension from within your Zoho CRM account using the Setup menu (see instructions below).

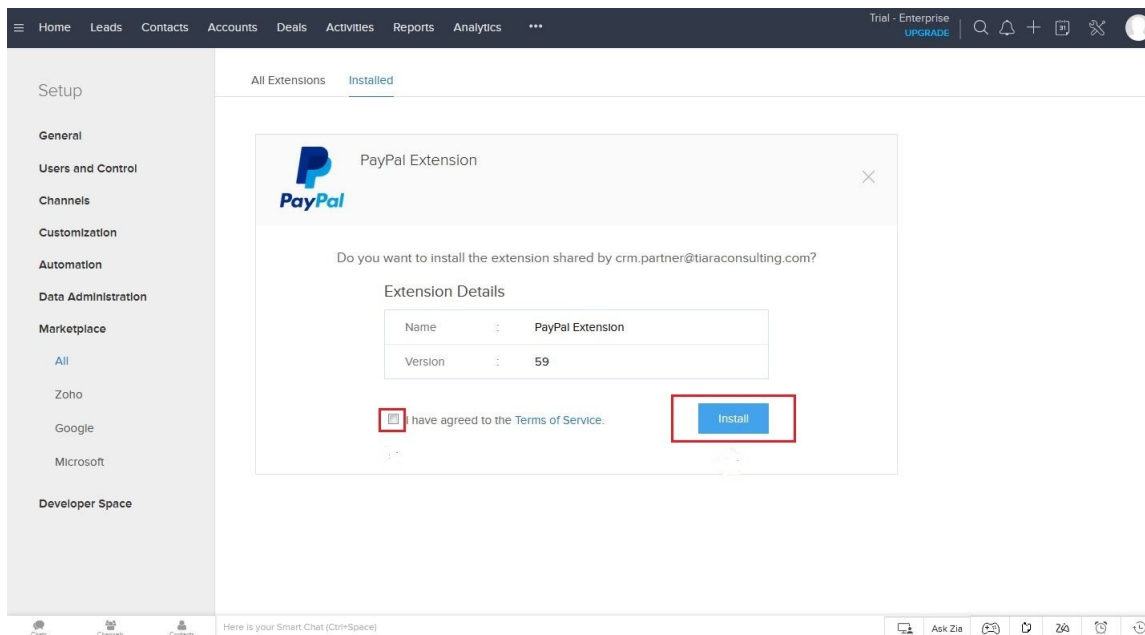
NOTE: The PayPal extension can be installed and used only in Zoho CRM Enterprise Edition and above.

To install the PayPal Extension:

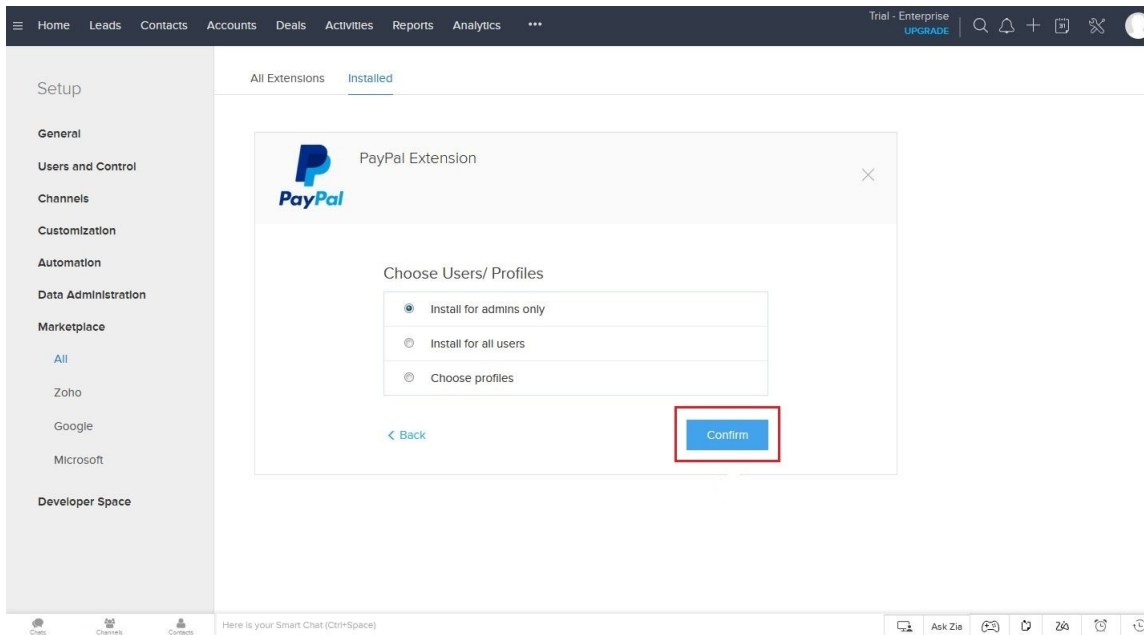
1. Go to **Setup > Marketplace > All**. All installed extensions are listed.



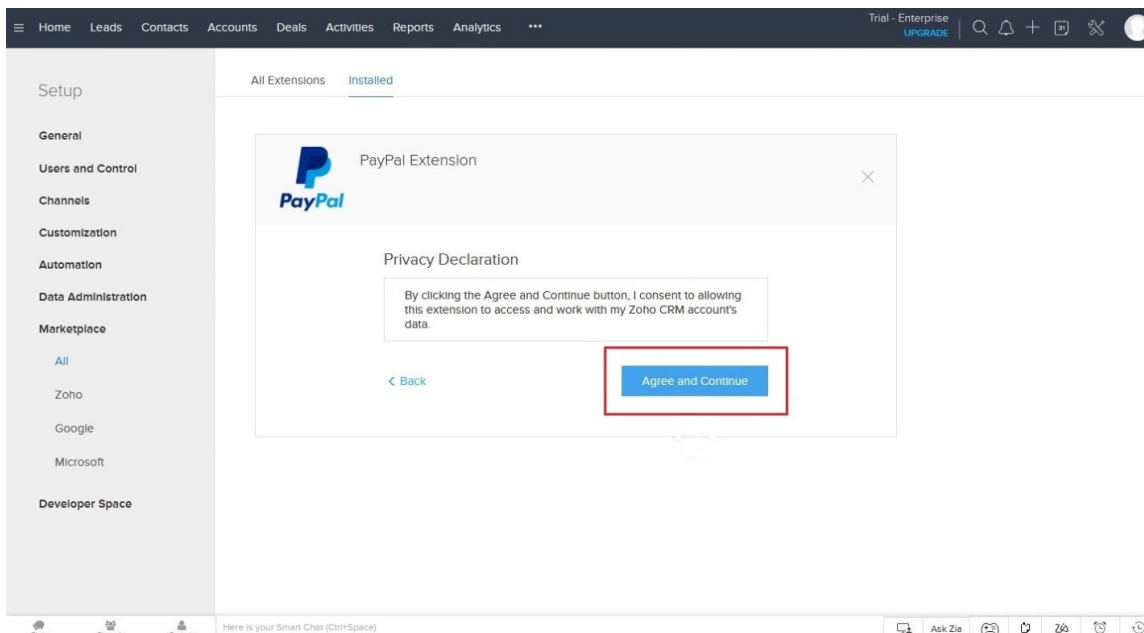
2. Click **All**, then click **PayPal** to see the extension details.
3. Click **Install Now**, agree to the Terms of Service, then click **Install**.



4. Under Choose Users/Profiles, select **Install for admins only** (default), **Install for all users**, or **Choose profiles** (e.g. Finance Manager), then click **Confirm**.



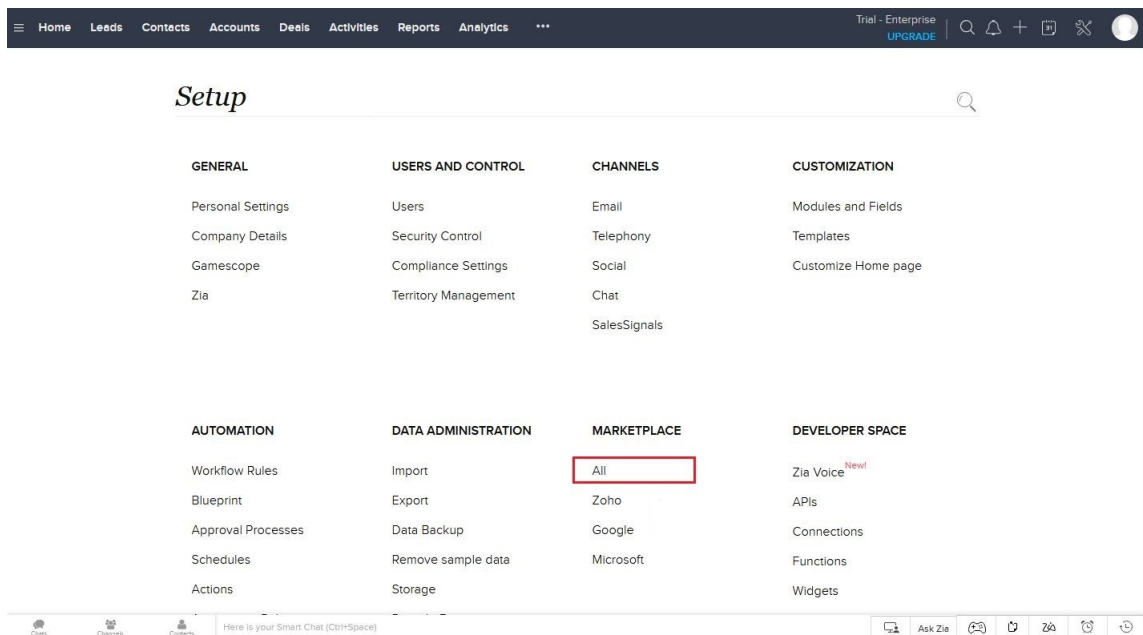
5. Click **Agree and Continue** to agree to the Privacy Declaration.



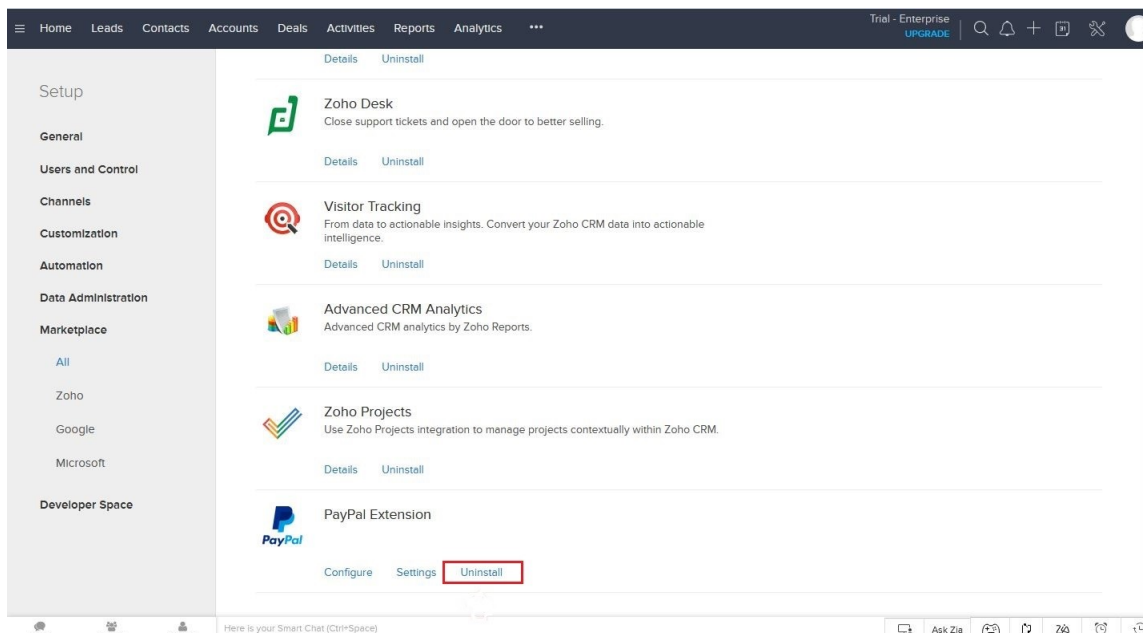
1.2 Uninstall the PayPal extension

You can uninstall the PayPal extension whenever you want. All data related to the extension will be deleted.

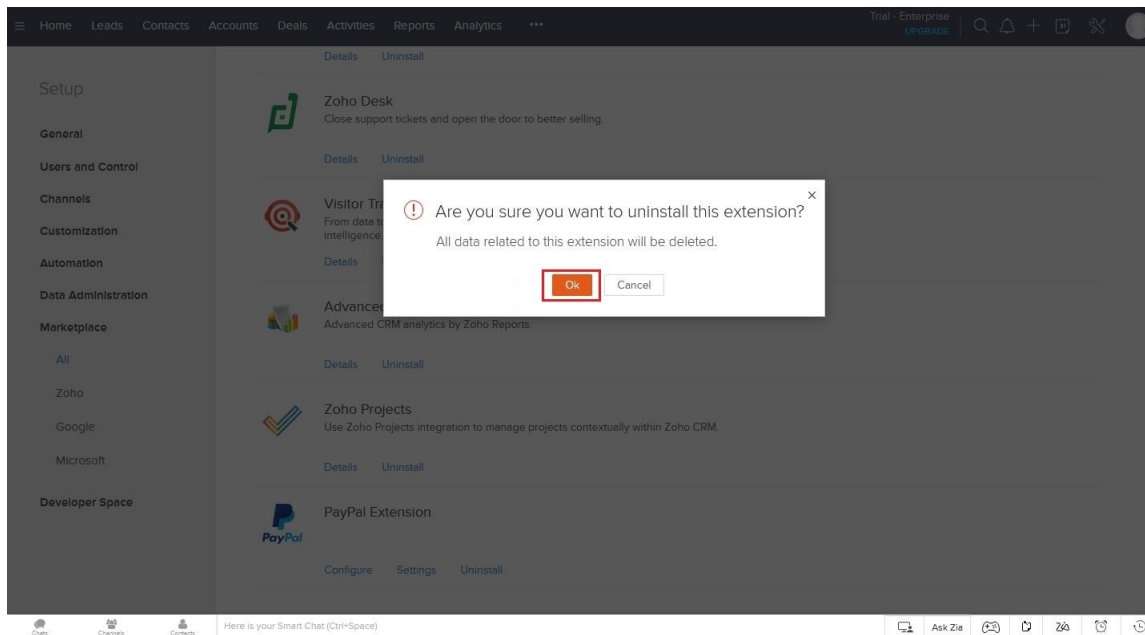
1. Go to **Setup > Marketplace > All**. All installed extensions are listed.



2. Click **PayPal Extension** to see the extension details, then click **Uninstall**.



3. Click **OK** to confirm the uninstall.



2 Functions

2.1 Custom Modules

Once the extension is installed, the following custom modules are created within the Zoho CRM account. These modules provide all the functions offered by the extension.

Module	Description
PayPal Account	Sets up a new PayPal Business Account where the customer will receive payments. You can set up more than one PayPal Business Account within a given Zoho CRM account.
Invoices – Send Invoice (Custom function within the Invoices module)	Once an invoice is generated within the Zoho CRM, this function pushes the invoice to PayPal and generates a corresponding Invoice, which PayPal automatically emails to the customer.
Payment History	Shows all sent invoices. If a PayPal invoice is generated, it is shown in both this module and in the Invoices module.

2.2 Set Up PayPal Accounts

After installing the extension, you need to set up the PayPal Business Account within the Zoho CRM. This is the account where all payments are received, and it must be a Business / Merchant Account only.

NOTE: You can set up more than one PayPal Business Account within a particular Zoho CRM account. At the time of sending the invoice for payment, you can choose the account to be used for processing the payment.

To set up the PayPal Business Account within the Zoho CRM:

1. Select **PayPal Account** within the Zoho CRM.



Create PayPal Account

Create and customize for your organization's needs.

Create PayPal Account

Import PayPal Account

2. Click **Create PayPal Account**.

A screenshot of the 'Create PayPal Account' form in Zoho CRM. The form is titled 'Create PayPal Account' and has a 'Cancel', 'Save and New', and 'Save' button at the top right. Below the title is a 'PayPal Account Image' field with a placeholder icon. Underneath is the 'PayPal Account Information' section, which contains several input fields: 'PayPal Account Name', 'PayPal Secret Key', 'PayPal Email', 'Webhook Connection', 'PayPal Client ID', 'Country Code', 'Webhook ID', and 'National Number'. The 'PayPal Account Name' field has a red border, indicating it is required.

3. Enter values for the following fields, then click **Save**.

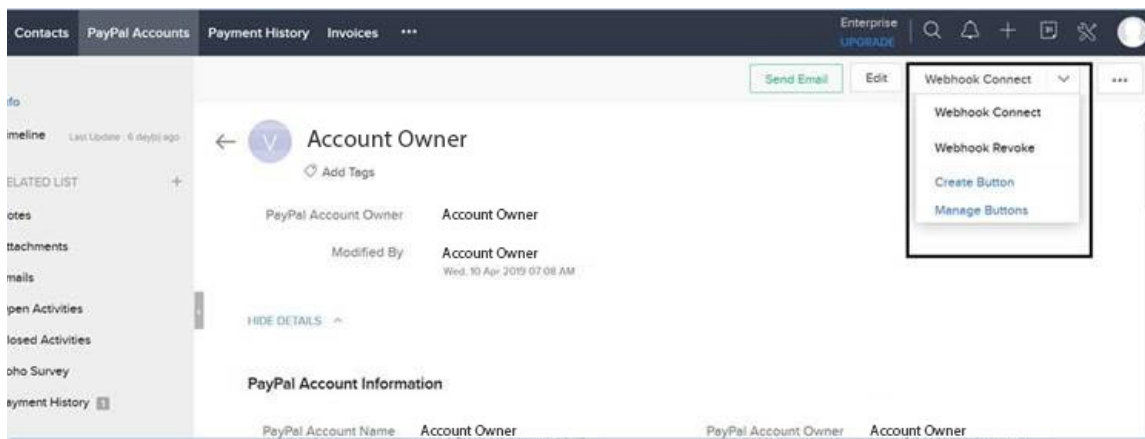
- **PayPal Account Name:** A unique name to identify the PayPal Business Account.
- **PayPal Email:** The email address of the PayPal Business account.

- **PayPal Client ID:** The PayPal Client ID for your PayPal Business Account. You will need to create a new PayPal REST API App to get your Client ID; see section 2.2.3, Get PayPal Credentials.
- **PayPal Secret Key:** The secret key for your PayPal Business Account. You will be able to get this secret key while getting the Client ID.
- **National Number:** Your phone number.
- **Country Code:** Your country code.
- **Webhook Connection:** Check whether your merchant account is connected to webhook updates.
- **Webhook ID:** The ID of webhooks which are connected to your account.

NOTE: You will only get real-time updates for the Zoho CRM if you have a Webhook connection.

2.2.1 Connect Webhooks

1. Provide your basic info (PayPal Account Name, Email, Client ID and Secret Key).
2. Click **Webhook Connect**. The Webhook ID and Subscription status will be automatically updated to your particular PayPal Account module.



NOTE: You will only get real-time updates for the Zoho CRM if you have a Webhook connection.

2.2.2 Revoke Webhooks

1. Select the PayPal Account in the PayPal Account module.
2. On the Details page, click **Webhook Revoke**.

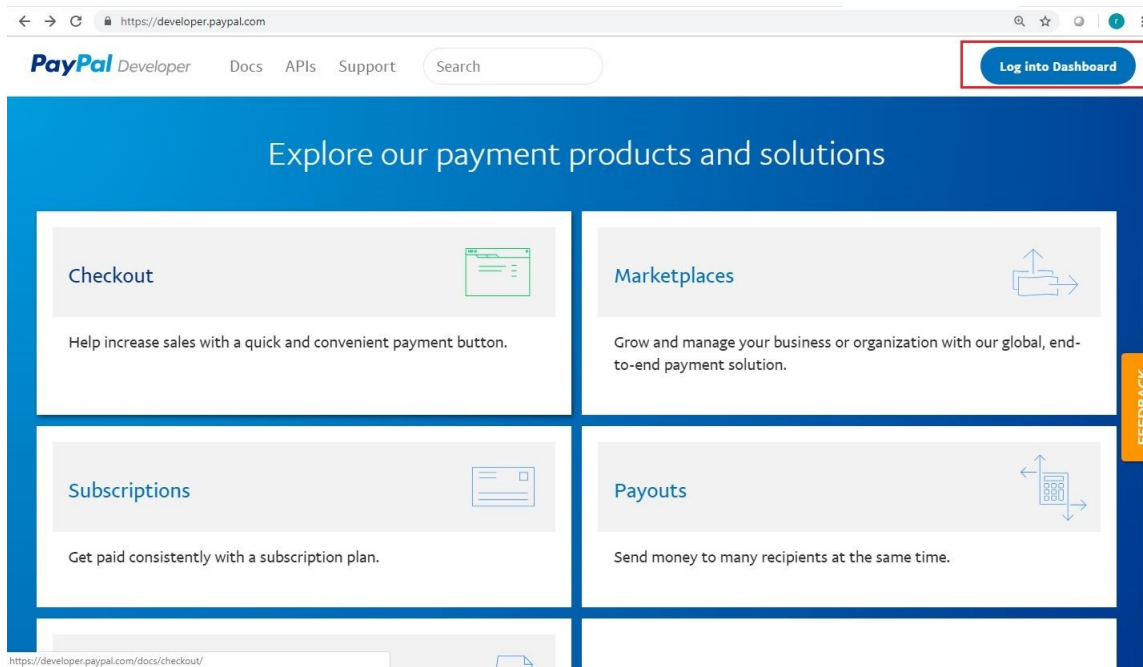
NOTE: If you revoke webhooks, no status or summary will be updated for the particular merchant account.

2.2.3 Get PayPal Credentials

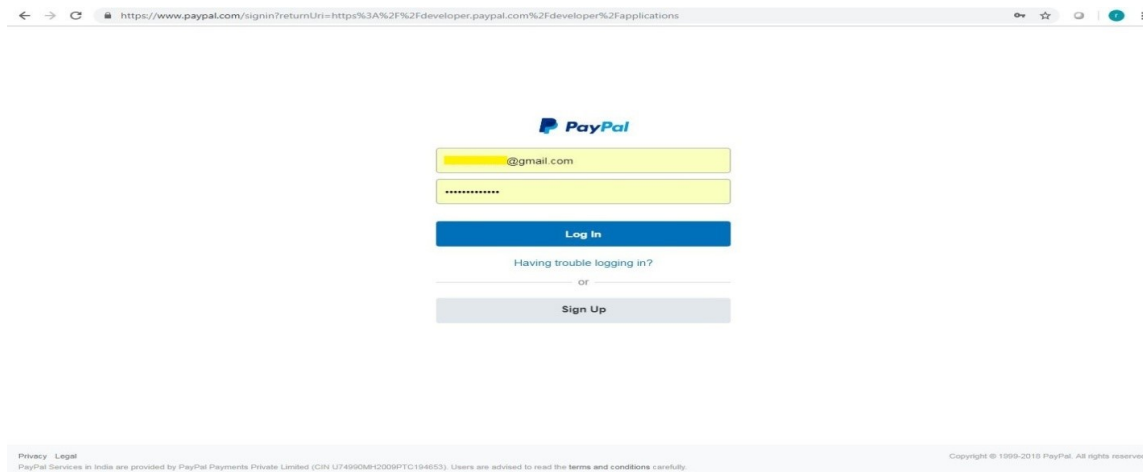
PayPal Credentials (Client ID and Secret Key) are required for this PayPal extension.

To get your PayPal Credentials:

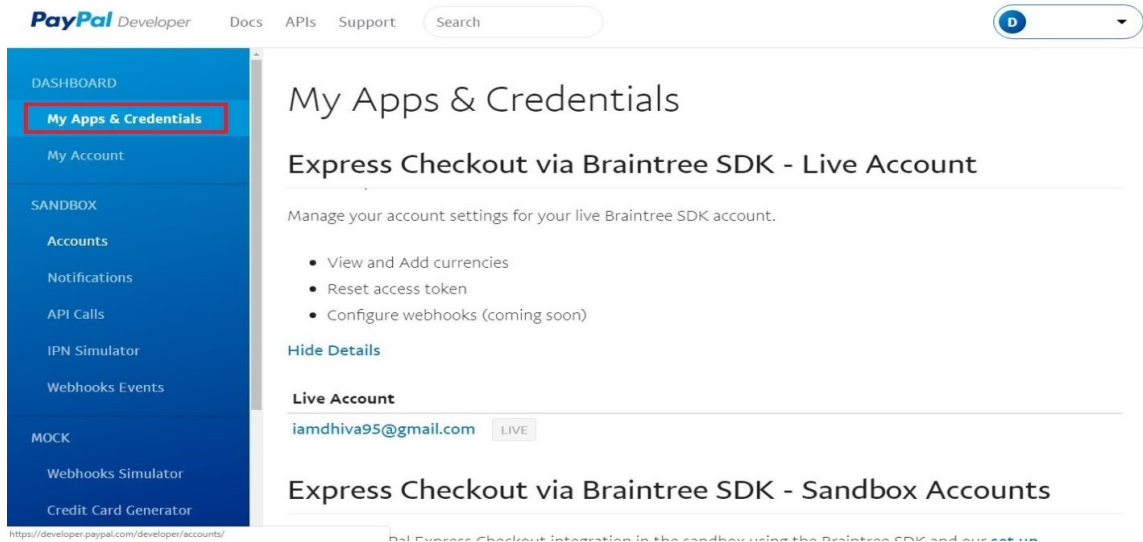
1. Log into the PayPal Developer Dashboard at <https://developer.paypal.com>.



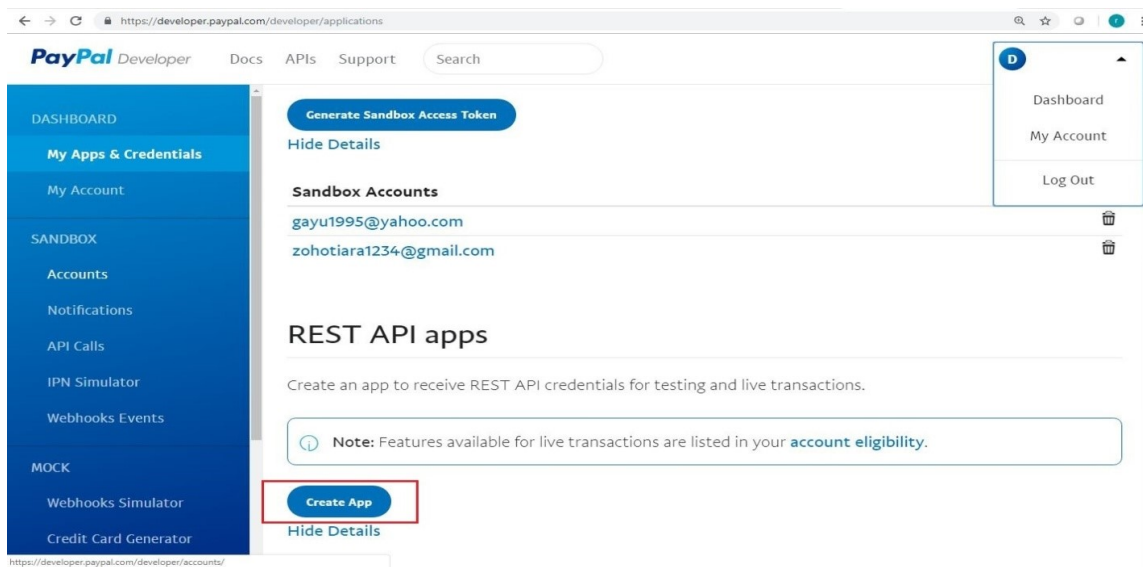
2. Enter your PayPal email and password.



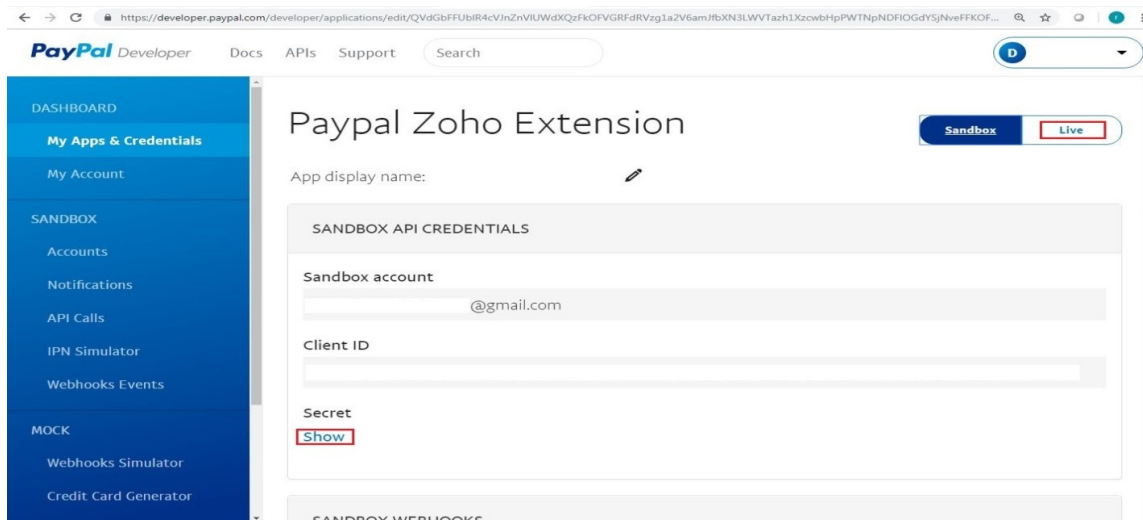
3. Click My Apps & Credentials.



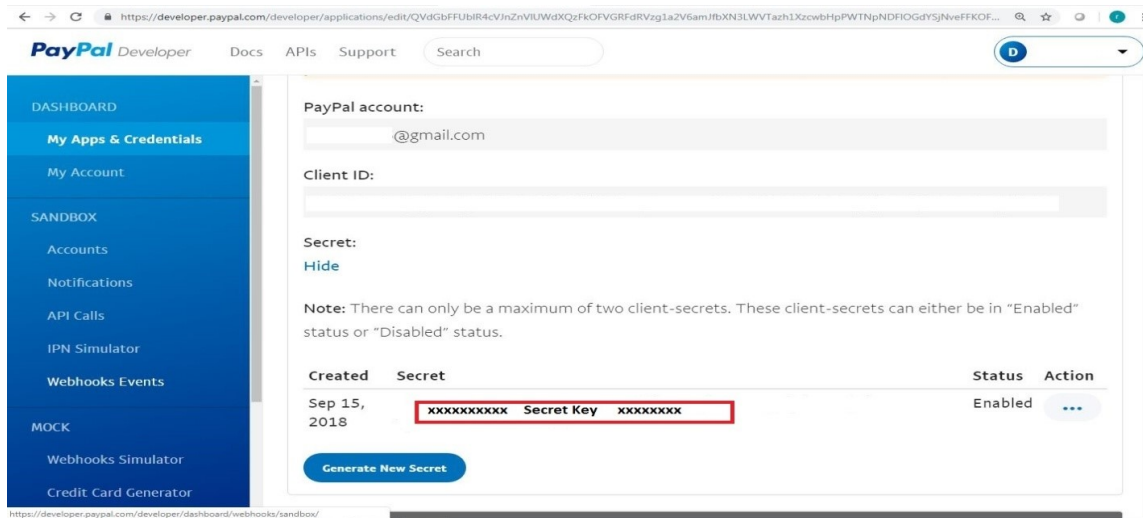
- Under REST API apps, click **Create App**.



- Fill out the form and click **Create App**.
- In the App you created, click **Live** to see the Client ID.



7. Click **Show** to get the Secret Key.



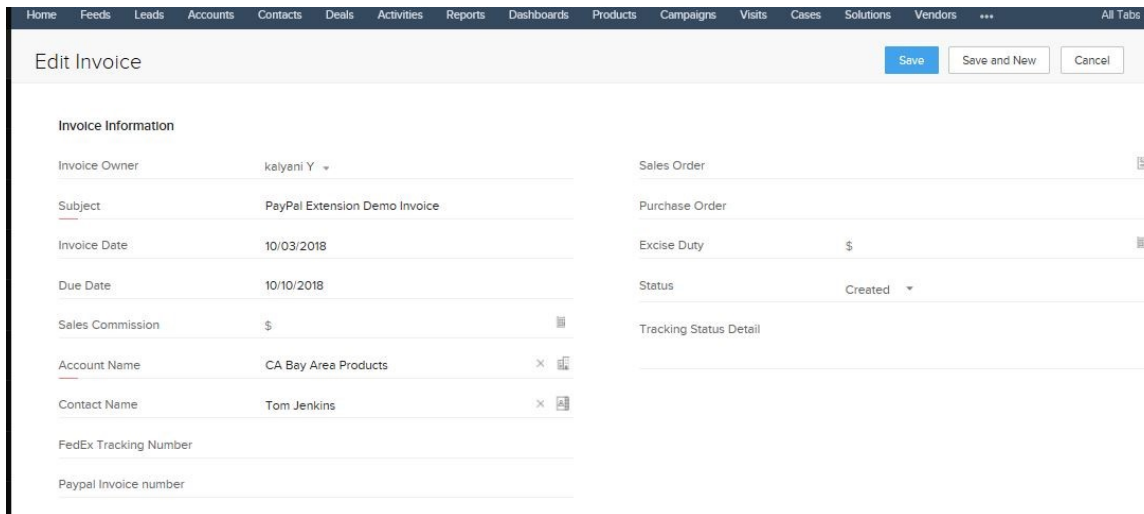
2.3 Create/Send PayPal Invoices

The extension offers an easy way for Zoho CRM users to process payments from their customers:

- Instead of emailing the Zoho CRM invoice with a link to Pay via PayPal, Zoho CRM users can push Zoho CRM invoices to PayPal and generate an equivalent PayPal Invoice, which PayPal then automatically emails to the customer with a link to **View and Pay Invoice**.
- The customer can view the PayPal Invoice in a separate browser, and then pay the invoice by clicking **Pay**. The payment status is updated in the Zoho CRM and the details can be viewed in the Payment History module.

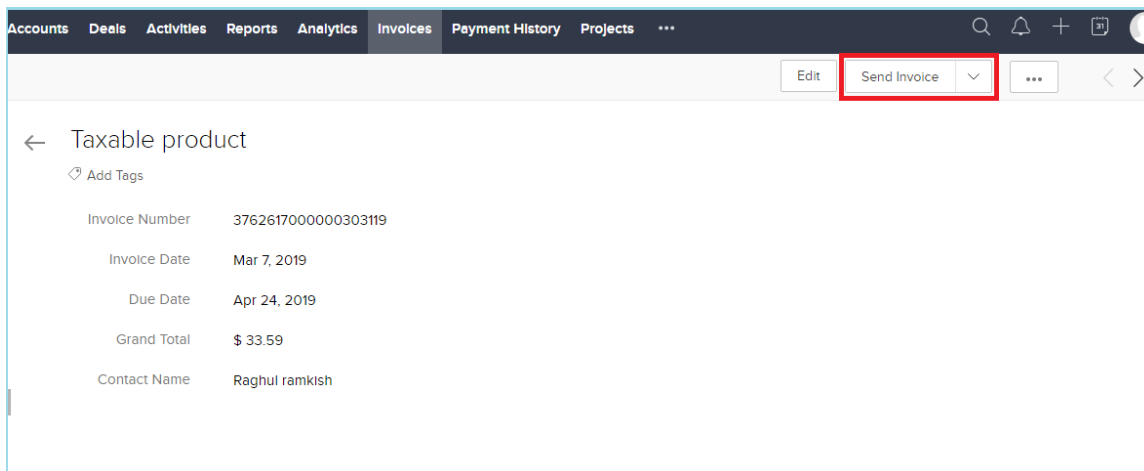
To create an invoice in Zoho CRM:

1. Go to the Invoices module and click **Create New Invoice** or click the plus icon (+).
2. Enter the **Subject**, **Invoice Date**, **Due Date** and **Account Name** (Customer Name).
3. Select the **Contact Name** to whom the invoice will be sent for payment.

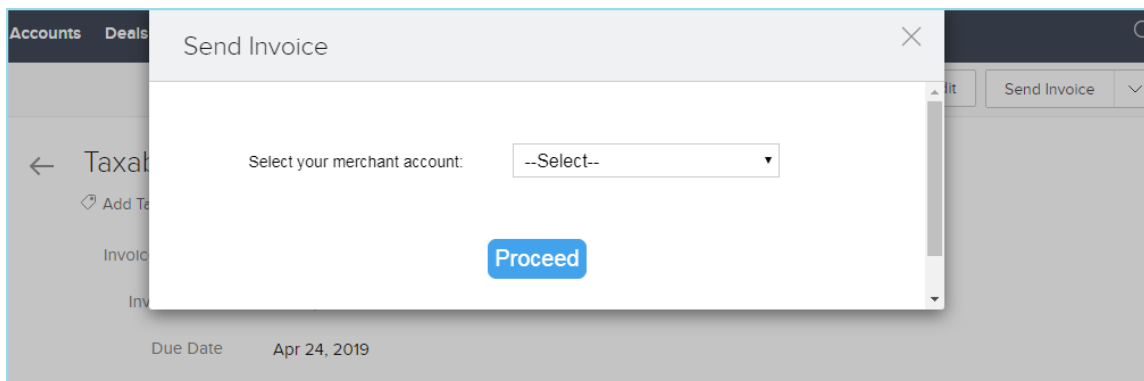


NOTE: This contact should be defined in the Zoho CRM with a valid email address or else it won't work.

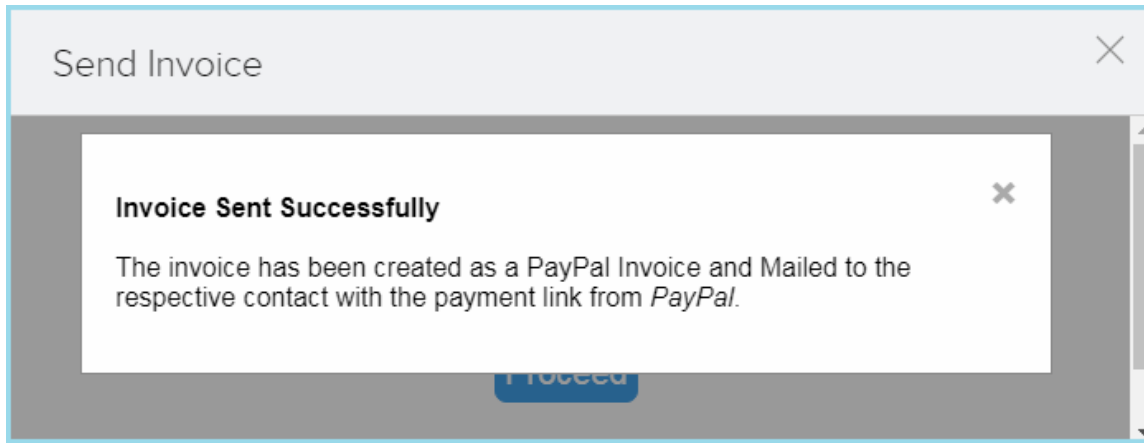
4. Add the invoice line items and click **Save** when the invoice is ready to be generated.
5. Click **Send Invoice**.



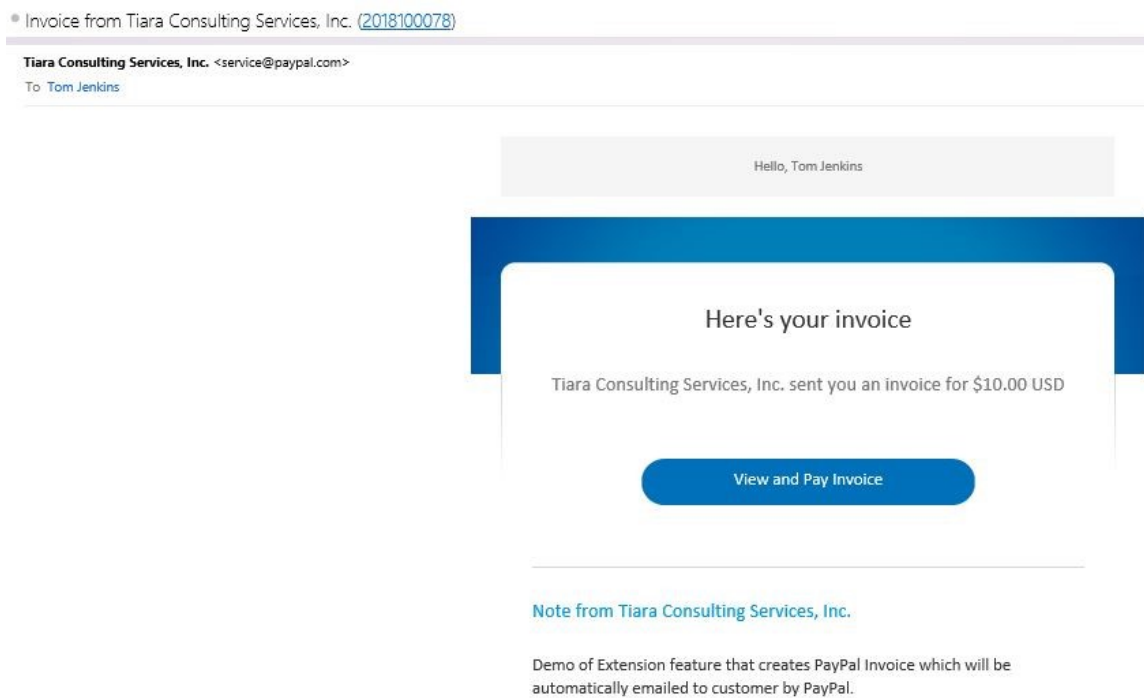
6. In the Send Invoice window, select the PayPal Business Account, then click **Proceed**.



7. When processing is complete, you will receive an **Invoice Sent Successfully** notification:




- The PayPal invoice is created. PayPal automatically emails the invoice to the customer with a **View and Pay Invoice** button.



- The customer clicks **View and Pay Invoice** to see all details as shown within the Zoho CRM.

SUMMARY ACTIVITY SEND & REQUEST WALLET SHOP Log Out

Invoice Details Print/PDF

Pay \$10.00 

INVOICE

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.

- The customer clicks **Pay** to make the payment using their PayPal account. The amount is credited directly into the Zoho CRM user's PayPal Business Account.

2.4 Cancel Invoice

You can cancel an invoice that has been sent to the customer.

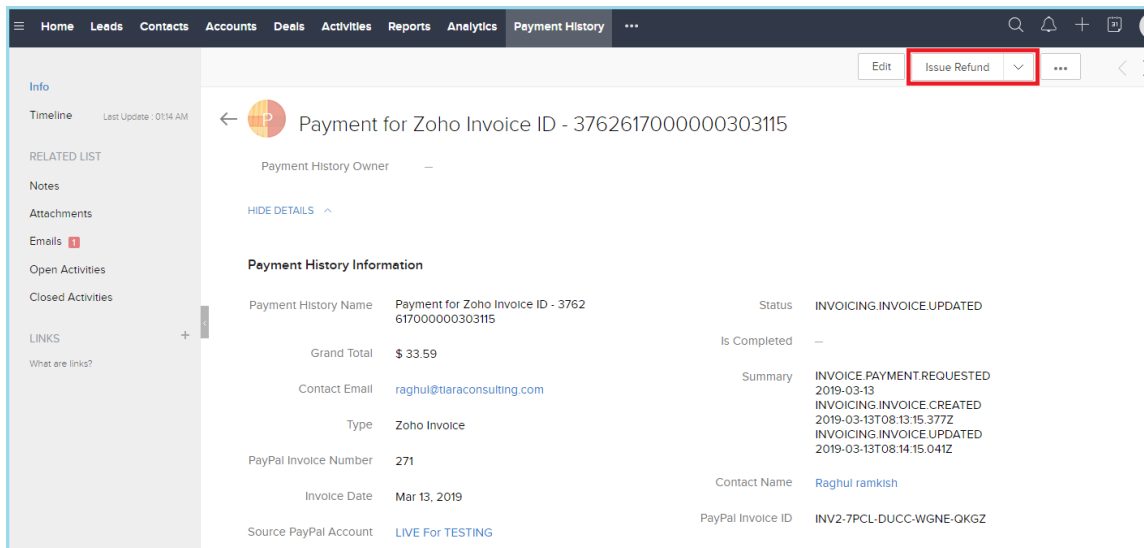
- Go to the **Payment History** module.
- Click **Cancel** next to the record you want to cancel.

NOTE: Only Zoho CRM and PayPal invoices can be cancelled.

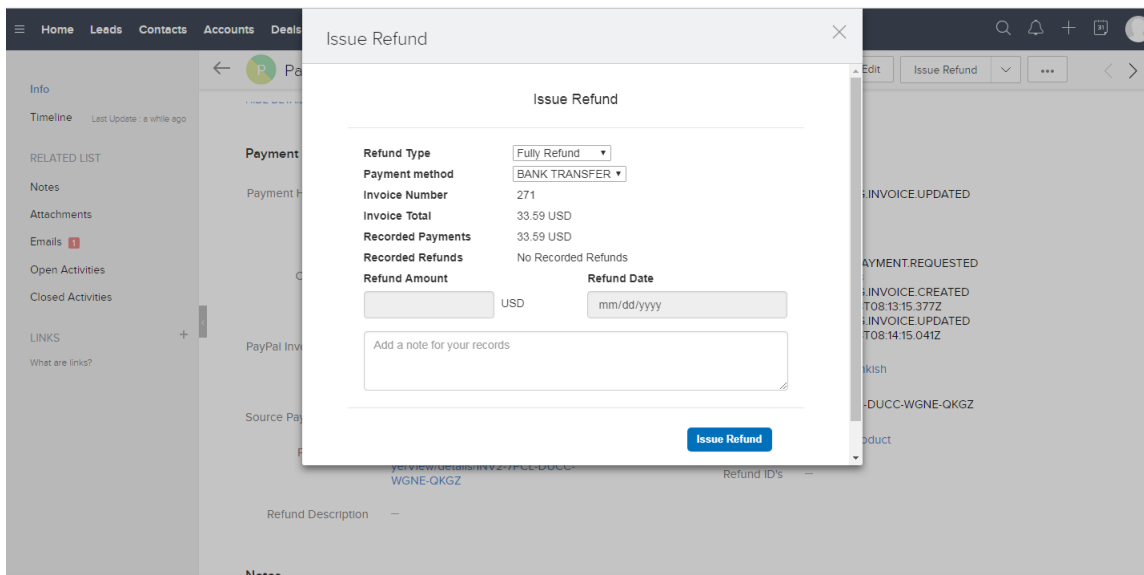
2.5 Issue Refund

You can refund an invoice that has been paid by the customer.

- Go to the **Payment History** module.
- Select the record transaction of the invoice you want to refund.
- Click **Issue Refund**.



4. Select your refund type and payment method, then click **Issue Refund**.

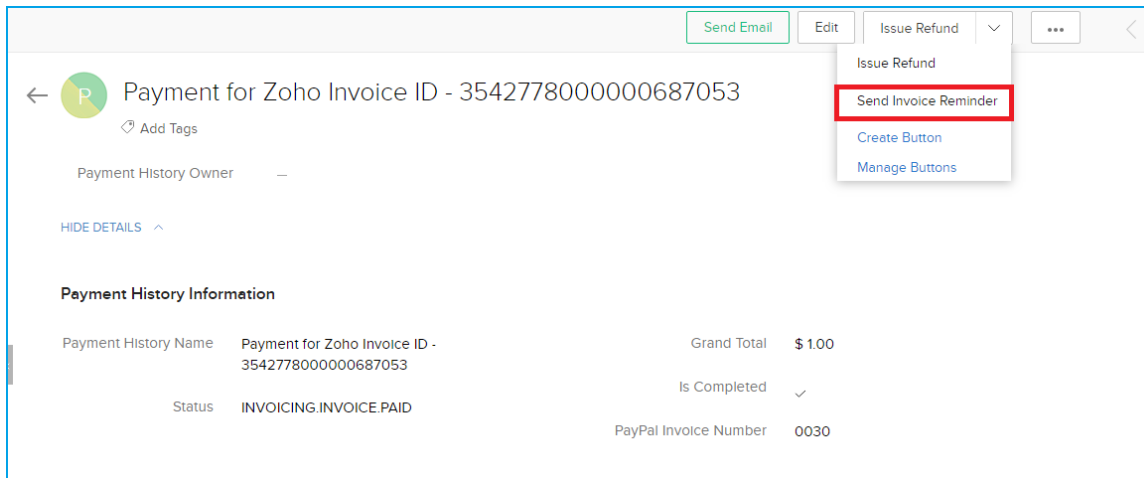


NOTE: Issue Refund functionality is available only to paid invoices.

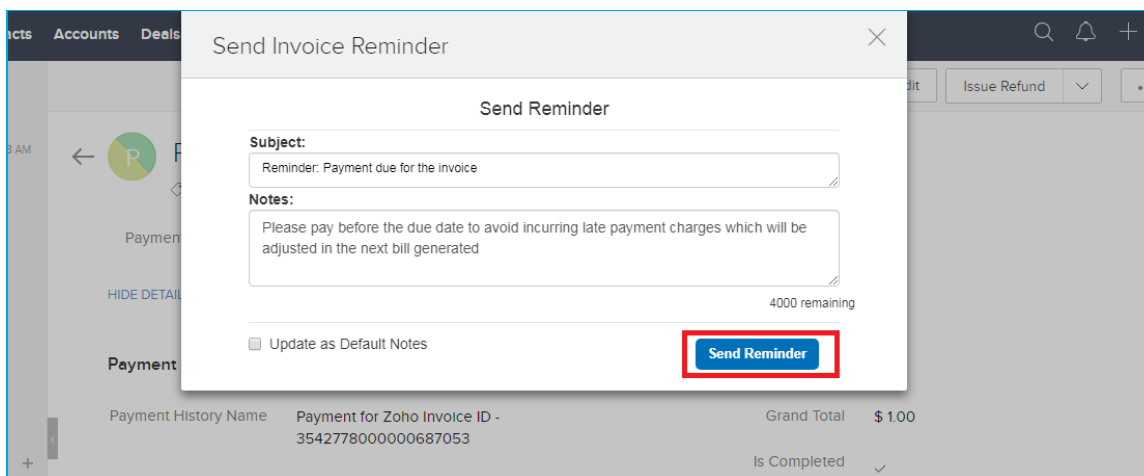
2.6 Send Reminder

You can send a reminder for an unpaid invoice to the customer.

1. Go to the **Payment History** module.
2. Select the record transaction of invoice you want to remind.
3. Click the down arrow next to **Issue Refund**, then select **Send Invoice Reminder**.



- On the Send Invoice Reminder window, click **Send Reminder**.



- Select **Update as Default Notes** to use the current notes as the default for all invoices. The subject will not be updated.

NOTE: Remind Invoice functionality is available only to unpaid invoices.

2.7 Update Invoice

You can update the invoice in Zoho CRM, and the same information will be updated at PayPal.

- Go to the **Invoice** module.
- Select the Invoice you want to update and edit it.
- Select **Update Invoice in PayPal** to update the new information at PayPal.

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	Raghul 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	<input checked="" type="checkbox"/>

Address Information Locate Map

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

4. Click **Save**.

NOTE: If you do not select **Update Invoice in PayPal**, the changes will not be updated at PayPal.

3 Payment History Module

3.1 View Payment Details

Payment History is a custom module that allow Zoho CRM users to view all payments received via PayPal.

To view the details of a payment:

1. Click a record under **Payment History Name**.

Accounts		Contacts	Deals	Activities	Reports	Payment History	...	All Tabs	Q	+	🎮	📅
<input type="checkbox"/>	<input type="checkbox"/>	PAYMENT HISTORY NAME										
<input type="checkbox"/>	<input type="checkbox"/>	Payment for Zoho Invoice No - 329214800000383154										
<input type="checkbox"/>	<input type="checkbox"/>	Payment for Zoho Invoice No - 329214800000383128										
Total Count: 2												10 Records Per Page

2. The Payment History information is displayed.

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 has been created, then the PayPal Invoice Number is shown in the PayPal Invoice ID field.