PAYWAY – ZOHO CRM EXTENSION: INSTALLATION GUIDE

FEBRUARY 3, 2020

TABLE OF CONTENTS

REVISION HISTORY

Revision	Date	Initials	Comments
1.0	12/11/19	MSC	Initial Draft
1.1	02/03/20	KM	Minor edits; moved uninstall section to end

INTRODUCTION

Payway is a secure and versatile software solution that helps card-not-present businesses simplify and accelerate transaction processing for improved cash flow and lowered costs. Zoho CRM is a popular CRM product for small and medium-sized businesses and is used by millions of users.

With this extension, users can easily process Payway payments for Zoho CRM invoices. The Payway payment status and all previous Payway transaction history are shown within Zoho CRM for easy reference.

This document provides 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.

A. Before the install, you will need to set up your Payway Merchant Account within the Zoho CRM. This will get you the Payway Credentials required to complete the Payway Extension install.
   To set up an account, go to payway.com/newcustomer. Should you need assistance, please call Payway at 800-457-9932, option 3.

Once your Account has been created, a Payway representative will provide you with the Install download as well as Payway credentials.

B. Install the Payway Extension
   - Click the Install button provided to you.
   - Make sure you check the “I have agreed to the Terms of Service” checkbox and the “I authorize Payway Extension for Zoho CRM to access and process my data as required” checkbox. Then click **Continue.** (Figure 1.0)

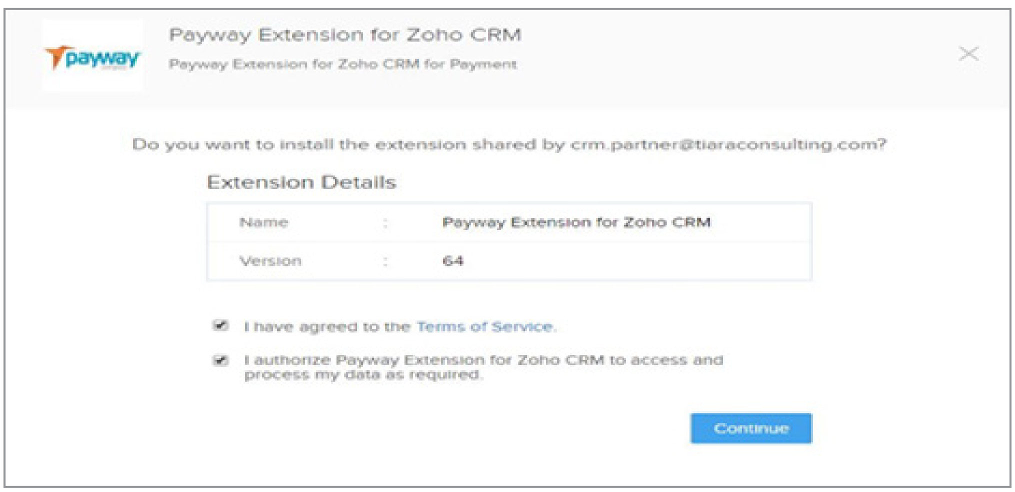

Figure 1.0

- Under Choose Users/Profiles, select **Install for admins only** (default), **Install for all users**, or **Choose profiles** (e.g. Finance Manager), then click **Confirm**. (See Figure 1.1)

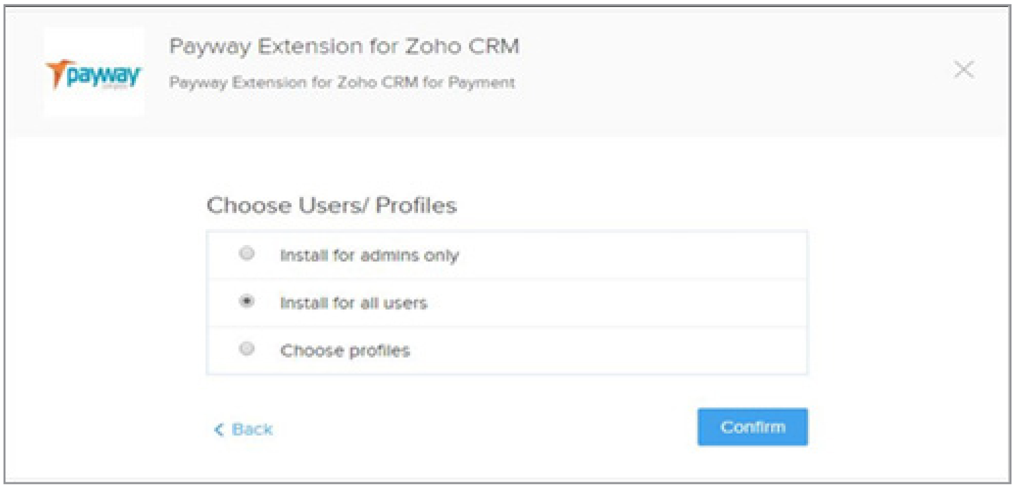

Figure 1.1

I. FUNCTIONS

A. Custom Modules

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

Module	Description
Invoices – Send Invoice (Custom Buttons within the Invoices module)	Once an invoice is generated within the Zoho CRM, Send Invoice button will mail the invoice to the respective contact with the payment link from Payway.
Payway Merchants	Sets up a new Payway Merchant for which you will receive payments. You can set up more than one Payway Merchant within a given Zoho CRM account.
Transaction History	Shows a list of all the invoices sent to the customers. If an invoice is generated, the transaction history and status will be maintained in this module.

B. Set Up Payway Merchants

Once you have secured Payway credentials, select the **Payway Merchants module within the Zoho CRM.** (Figure 1.2)

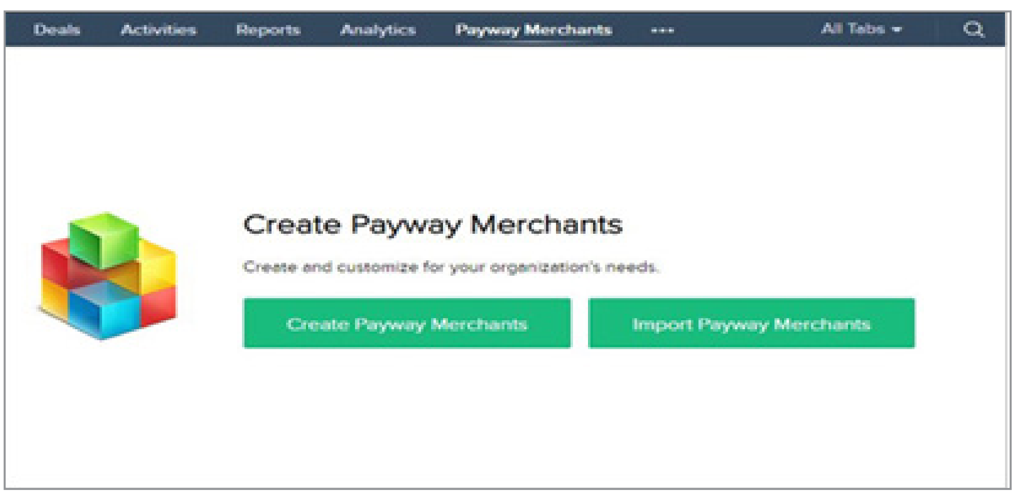

Figure 1.2

C. Click **Create Payway Merchants.**

D. Complete most of the following fields using the credentials provided to you:

- **Payway Merchants Name:** A unique name to identify the Payway Merchant
- **Payway Merchants Owner:** The person at your company responsible for the Merchant Account
- **User Name:** Provided by Payway
- **Password:** Provided by Payway
- **Division ID:** Provided by Payway
- **Source ID:** Provided by Payway
- **Email Address:** Email ID for the Merchant Account
- **First Name:** First Name of sender
- **Last Name:** Last Name of sender
- **Payway Customer Name:** Provided by Payway

E. Click **Save**.

NOTE: You can set up more than one Payway Merchant 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.

C. Create / Send Payway Invoices

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

1. Go to the Invoices module and click the plus icon (+) to enter the **Create Invoice** page.
2. Enter **the Subject, Invoice Date, Due Date** and **Account Name** (Customer Name). (Figure 1.3)
   a. Note: The information that you enter into the Subject field is displayed in the Subject line of the email that is sent to request payment.

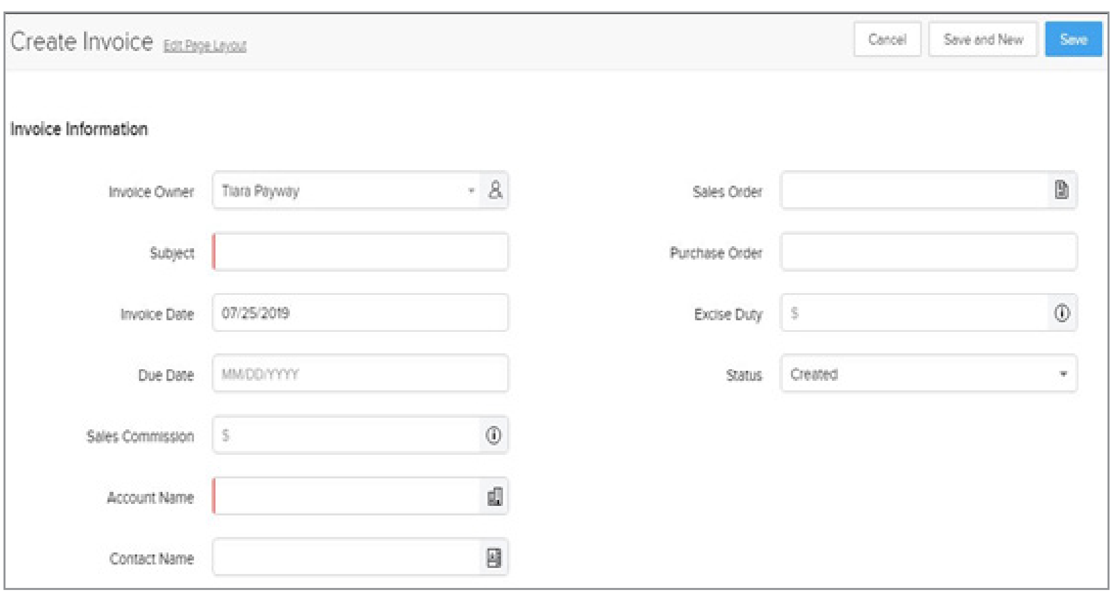

Figure 1.3

3. Select the **Contact Name** to whom the invoice will be sent for payment.

   IMPORTANT NOTE: This contact should be defined in the Zoho CRM with a valid email address or else the "Create Invoice" function won't work.

4. Add the invoice line items and click **Save**. The invoice will be generated.

   IMPORTANT NOTE: You can add Products to the Products module prior to generating the invoice. Alternatively, the system will prompt you to "+Add New Product." (Figure 1.4)

Figure 1.4

5. Click **Send Invoice.** (See Figure 1.5)

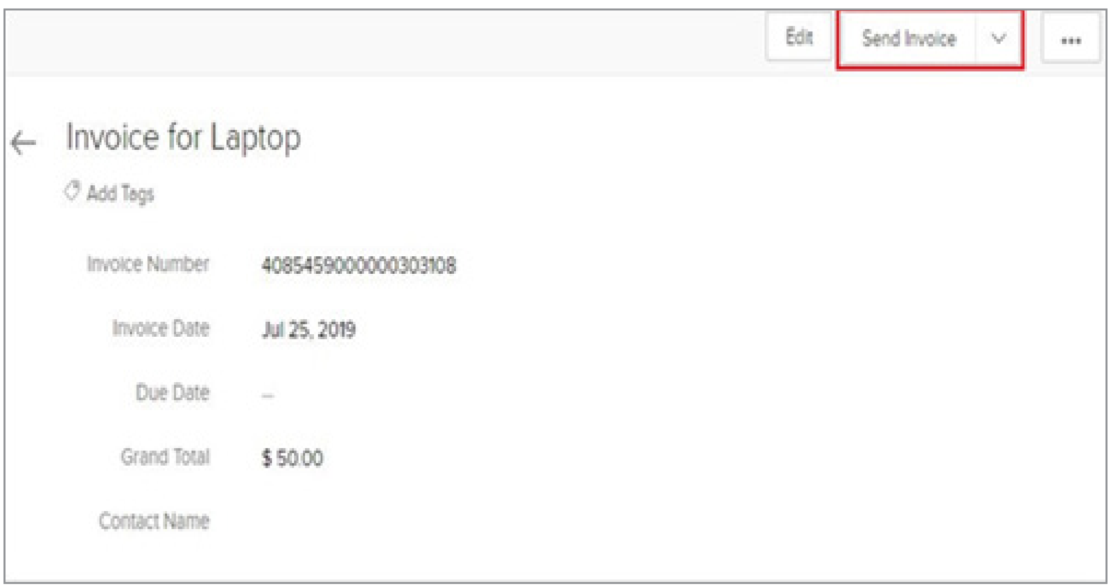

Figure 1.5

6. In the **Send Invoice** window, select the Payway Merchant account and then click **Proceed.**(Figure 1.6)

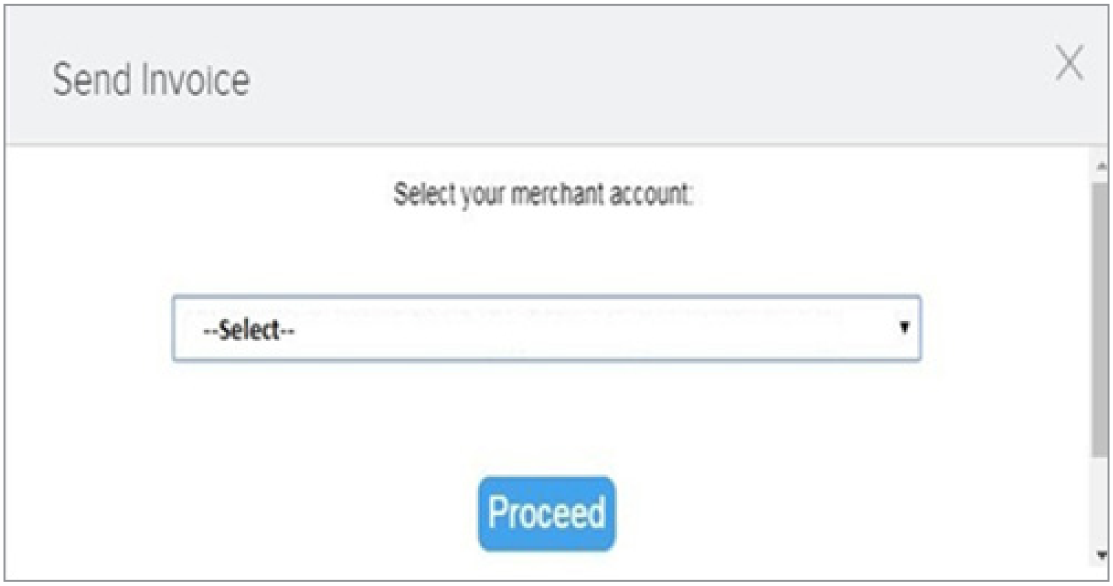

Figure 1.6

7. When processing is complete, you will receive a "Payment Processing is Successful" notification. (Figure 1.7)

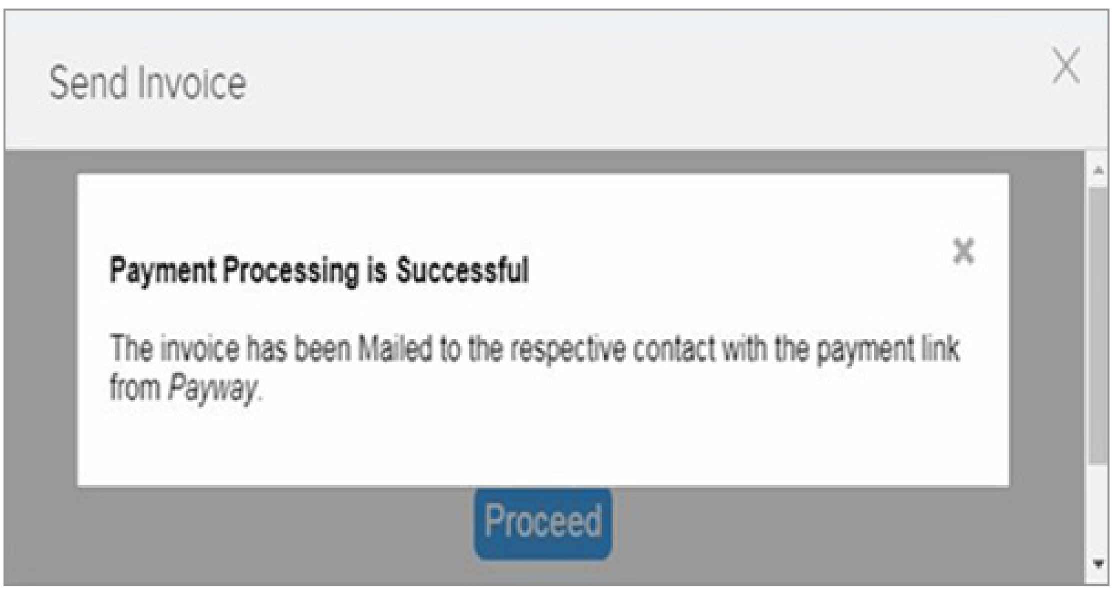

Figure 1.7

8. Zoho CRM automatically emails the invoice to the customer with the payment link associated with the Pay Invoice button shown in the email. (Figure 1.8)

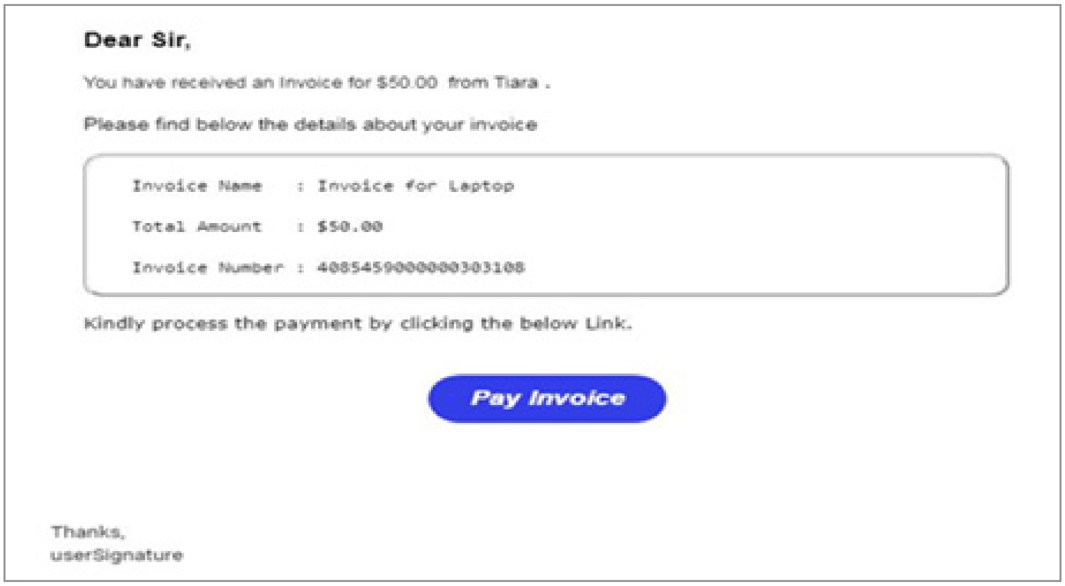

Figure 1.8

IMPORTANT NOTE: The signature of the outbound email can be changed.

The Invoice Owner is the first field displayed when creating the invoice. That is the Zoho user at your company who is sending the invoice. Prior to sending the invoice, the Invoice Owner should:

- Go to **Settings/General/Personal Settings**
- Scroll down to the Signature field
- Click the pencil icon next to the Signature field and enter the content that should be displayed as the Signature
- Click **Save**

9. The customer clicks **Pay Invoice** and is connected to the screen shown below. The customer enters the credit card information and clicks **Process Transaction** to make the payment..

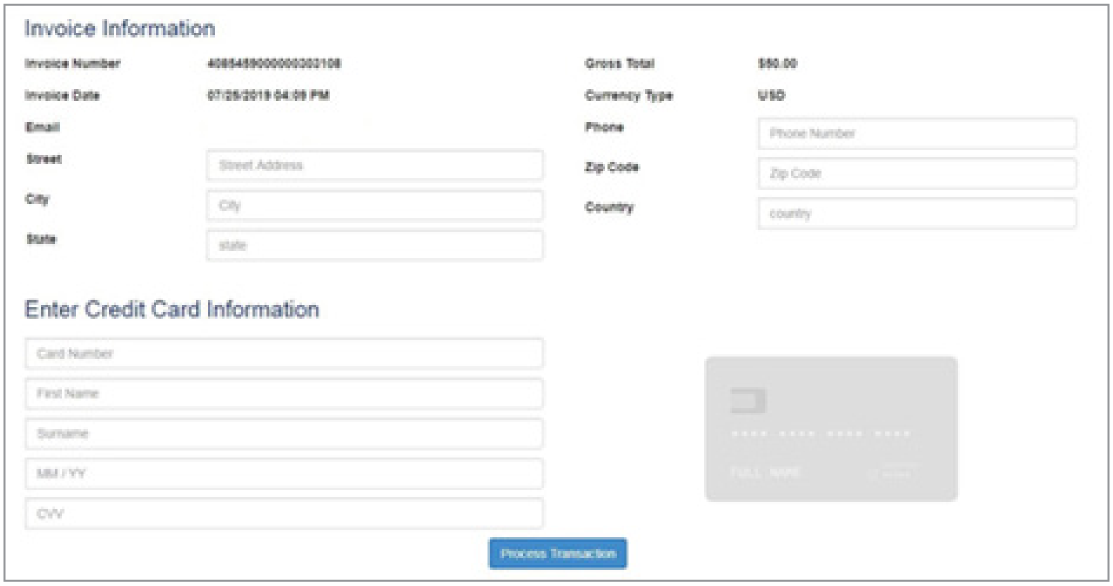

Figure 1.9

10. Once the payment is successful, the **"Payment Successful"** notification is displayed with the Transaction ID. Funds are deposited to the merchant account the next business day. (Figure 2.0)

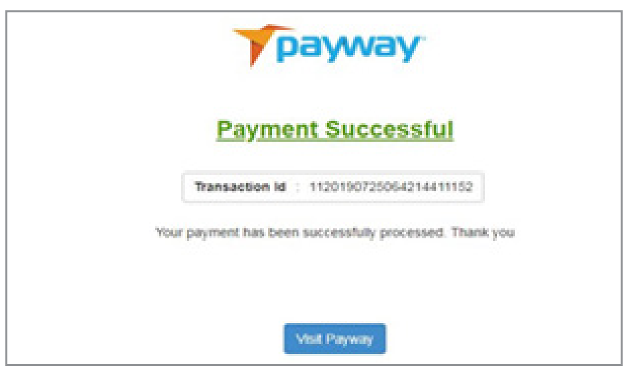

Figure 2.0

D. Cancel Invoice

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

NOTE: the time limit for cancelling a payment request is 24 Hours from the date/time when the invoice is generated and sent to request payment.

1. Go to the **Transaction History** module.
2. Click on the record name for the Transaction you want to cancel and then select **Cancel** from the upper right-hand corner.
   3. In the Cancel window, the customer can cancel the sent invoice using the **Cancel** button.(Figure 2.1)

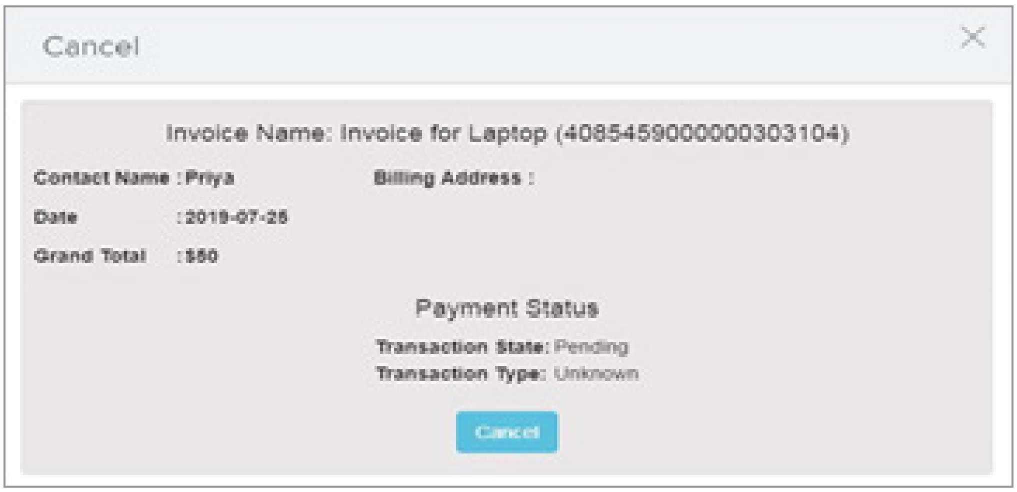

Figure 2.1

4. Once cancelled, the customer can see the **Payway Cancellation State** and **Payway Cancelled Description**. (Figure 2.2)

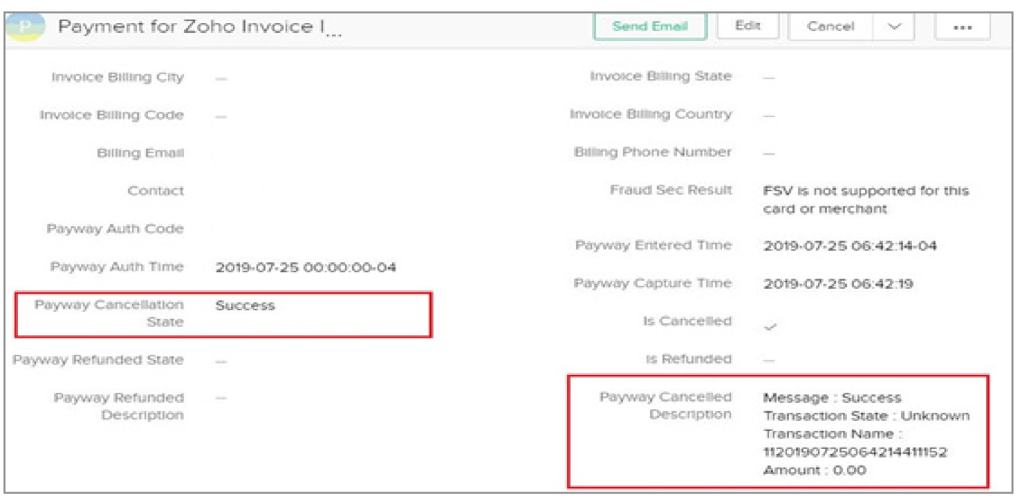

Figure 2.2

E. Refund / Credit

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

1. Go to the **Transaction History** module.
2. Click on the record name for the Transaction you want to refund.
3. Click **Refund** from **Cancel** menu. (Figure 2.3-2.4)

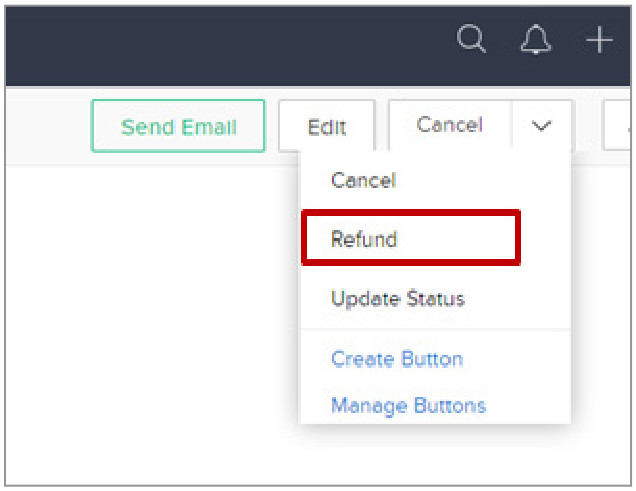

Figure 2.3

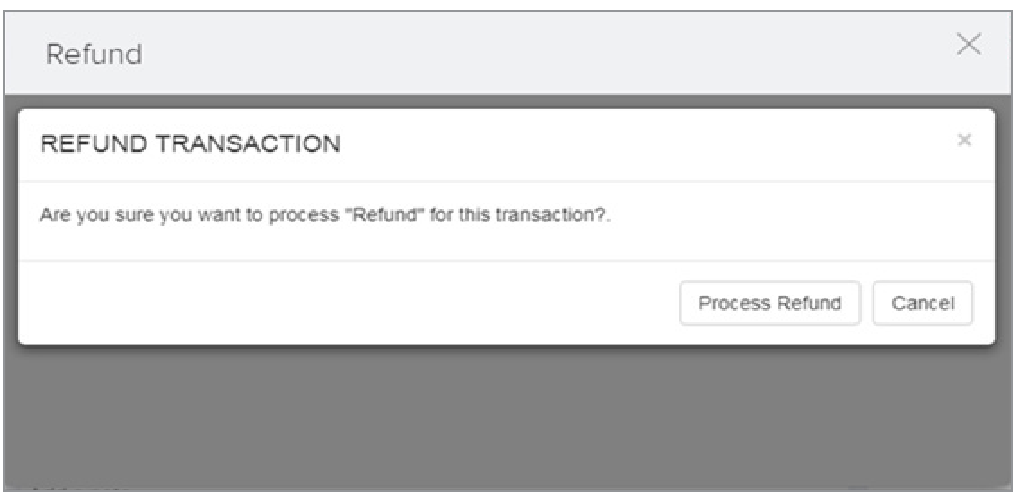

Figure 2.4

NOTE: Refund/Credit functionality is available only to **paid** invoices.

4. Once the Refund is done, the customer can see the **Payway Refunded State** and **Payway Refunded Description**. (Figure 2.5)

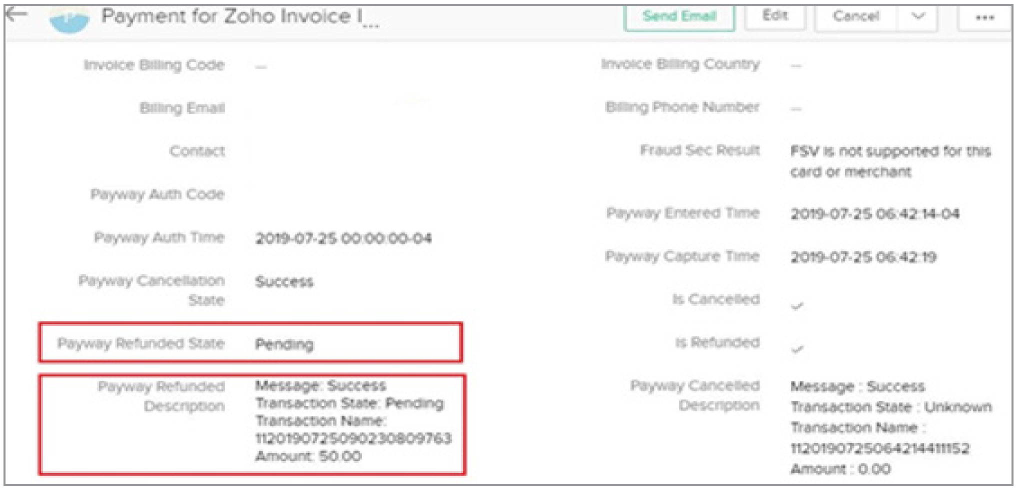

Figure 2.5

Note: When the merchant unchecks the **Is Refunded** checkbox and tries to refund the transaction, the amount will be credited to the customer's account.

II. TRANSACTION HISTORY MODULE

A. View Transaction Details

Transaction History is a custom module that allows Zoho CRM users to view all payments that have been done within Zoho CRM.

To view the details of a payment:

1. Click a record under Transaction History Name. (Figure 2.6)

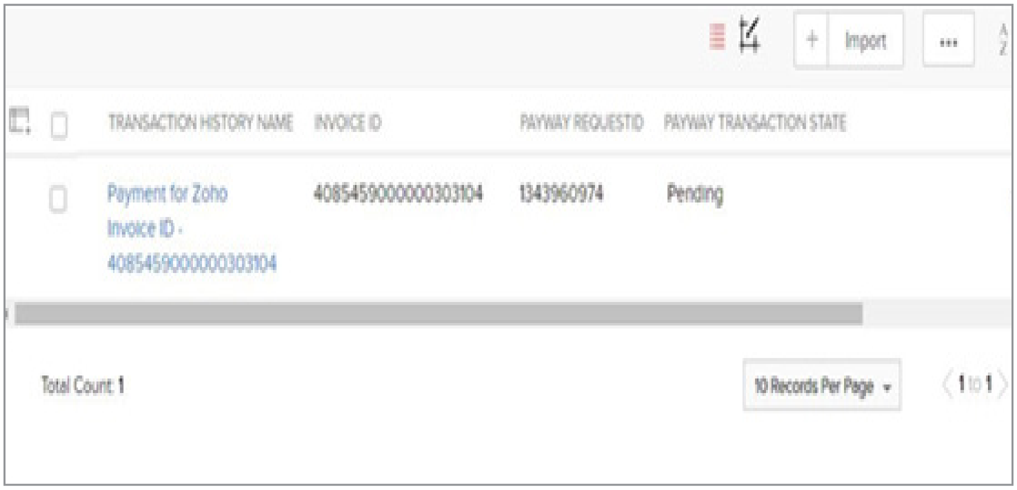

Figure 2.6

2. The Transaction History information is displayed as shown below.

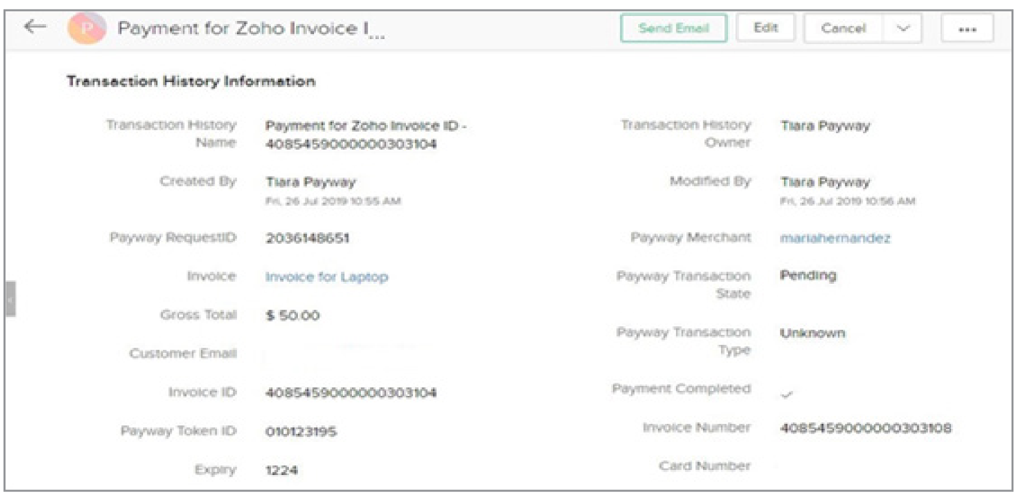

Figure 2.7

III. UNINSTALL THE PAYWAY EXTENSION

You can uninstall the Payway Extension whenever you want. After successful uninstall, all the data related to the extension will be deleted.

To uninstall the Payway Extension, please follow the below steps:

- Go to **Setup>Marketplace>All>Installed** tab. All installed extensions are listed.
- Click **Payway Extension** to see all the extension details and then click **Uninstall**. (Figure 2.8)

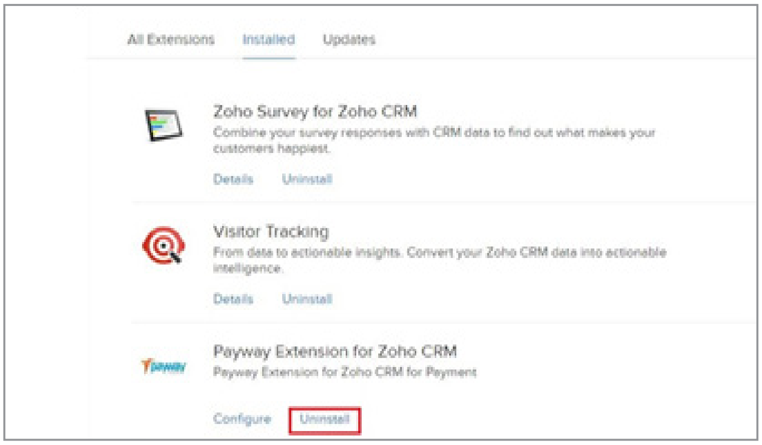

Figure 2.8

Click **OK** to confirm uninstall.

*** End of Installation Guide ***