PayU

On

ZOHO

User Guide

For PayU Payment Links on Zoho CRM

About PayU

Empowering over 4.5 lakh businesses, PayU is India's leading payments service provider. PayU processes around US$1 Billion of transactions each month and powers payments for 60% of airline business and 80% of e-commerce business. **PayU is instant, trusted and secure!**

Accept all payment options, get payments directly in your bank account and grow your business effortlessly!

Contents

Introduction

PayU's payment links for Zoho CRM enables you to collect payments right
from your Zoho CRM. It offers you the ability to send payment links
against your customers' invoice via Email or SMS and track real time status
of these payments right on your Zoho CRM dashboard.

This User Guide will enable you to derive the maximum out of your PayU
Payments extension for Zoho CRM.

Getting Started

Here's how you can start collecting payments against your customer's invoice from your Zoho CRM:

> **Create your PayU account**

> **Connect PayU Account With Zoho CRM**

> **Collect payments directly from your Zoho CRM account**
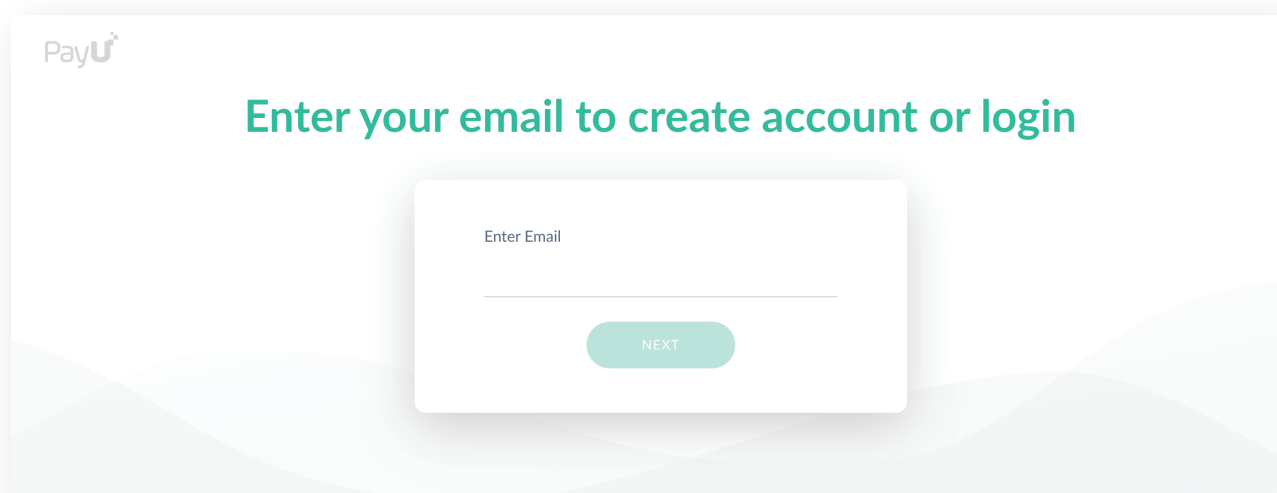
Create Your PayU Account

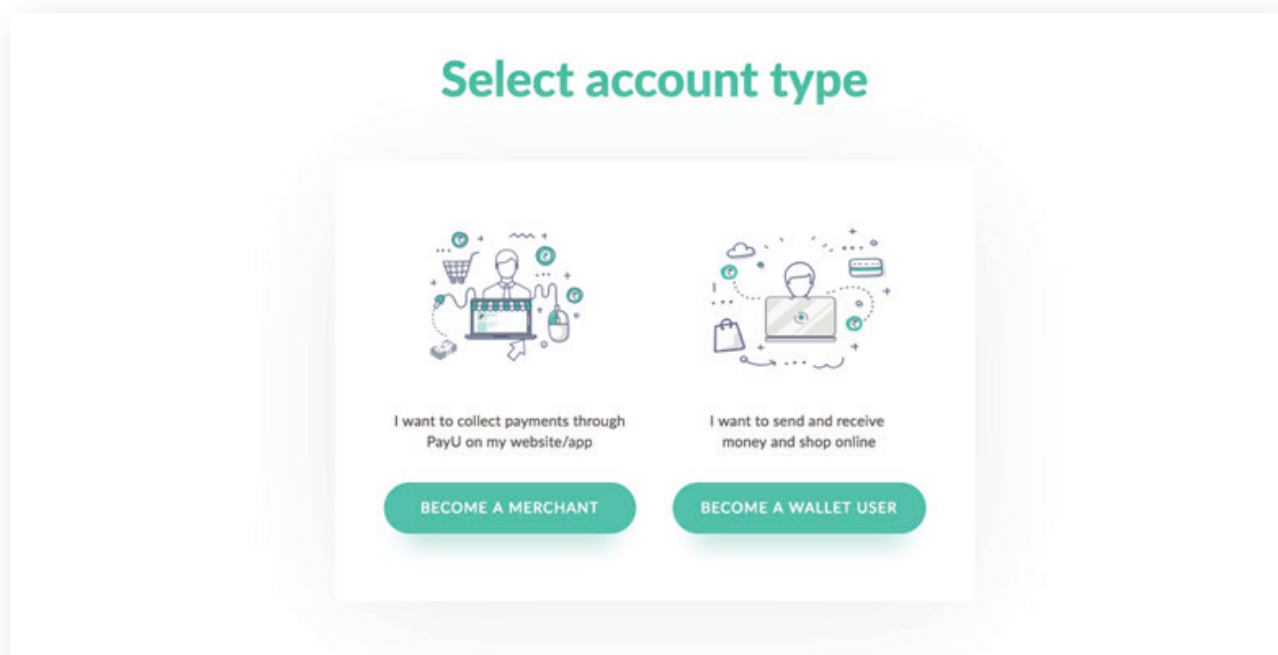*Note: If you already have a PayU merchant account, please skip this step.*

To simplify the process, let us divide it into 4 easy steps.

> **Sign up on PayUmoney**

   Click here to sign up on PayUmoney
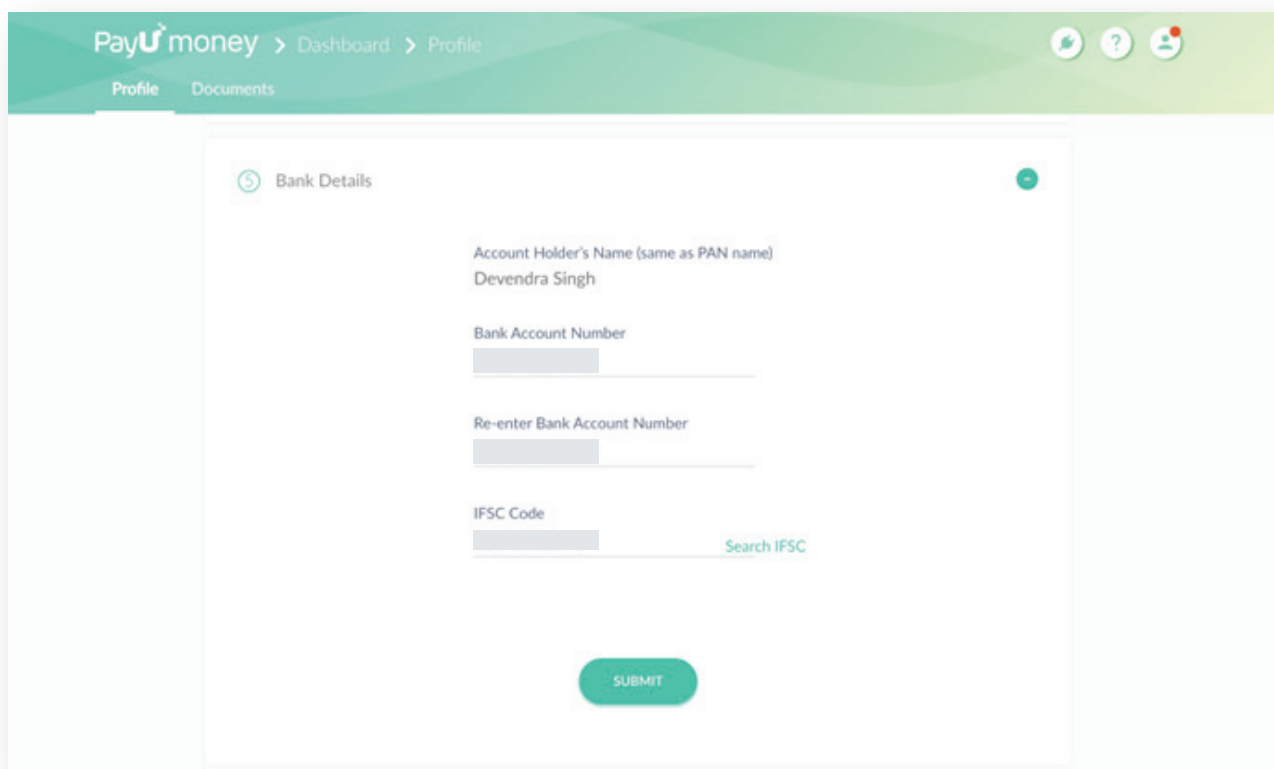
> ## Click on 'Become A Merchant'

> ## Complete your profile

> Select the 'Complete Your Profile' option, enter your basic details and hit
> 'Submit'
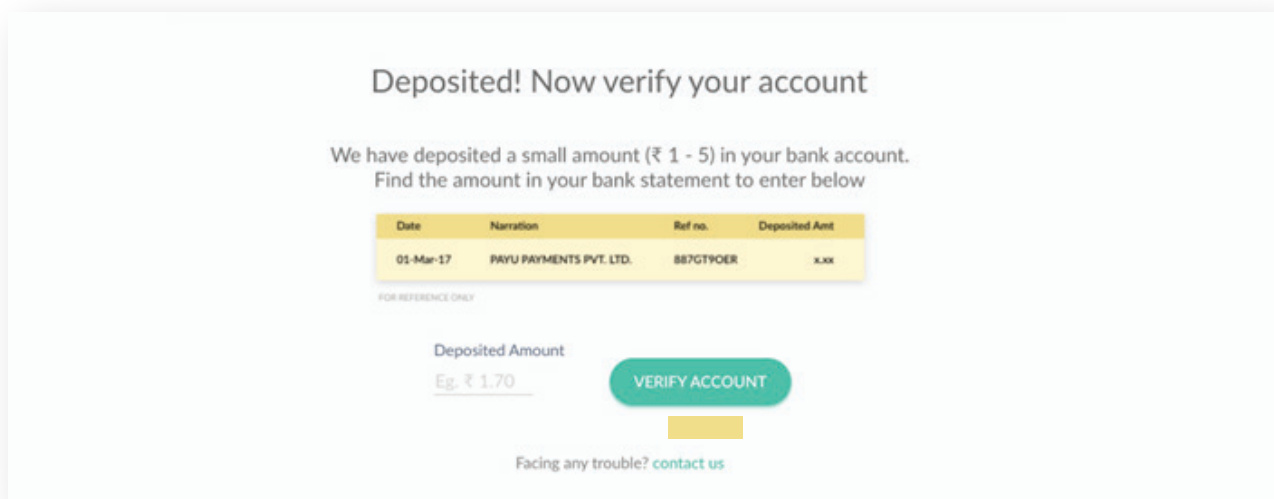
A small amount will be deposited by 'PayU Payments Pvt. Ltd.' in your bank account

Verify the bank by entering the exact amount deposited by 'PayU Payments Pvt. Ltd.'

> Upload your documents

To make it easier, we have simplified the process by making the entire documentation 100% online!

Click here and watch the video to learn how you can upload documents on PayUmoney dashboard.

After you upload, we'll verify the documents and update you via email.

Your PayU account is now all set! For any assistance that you might need, please **contact us here.**

Connect PayU Account With Zoho CRM

> Once you have activated your PayU account, log into Zoho CRM

> On your CRM toolbar, click on 'PayU Settings' and enter your Merchant ID, Merchant Salt and Merchant Key details
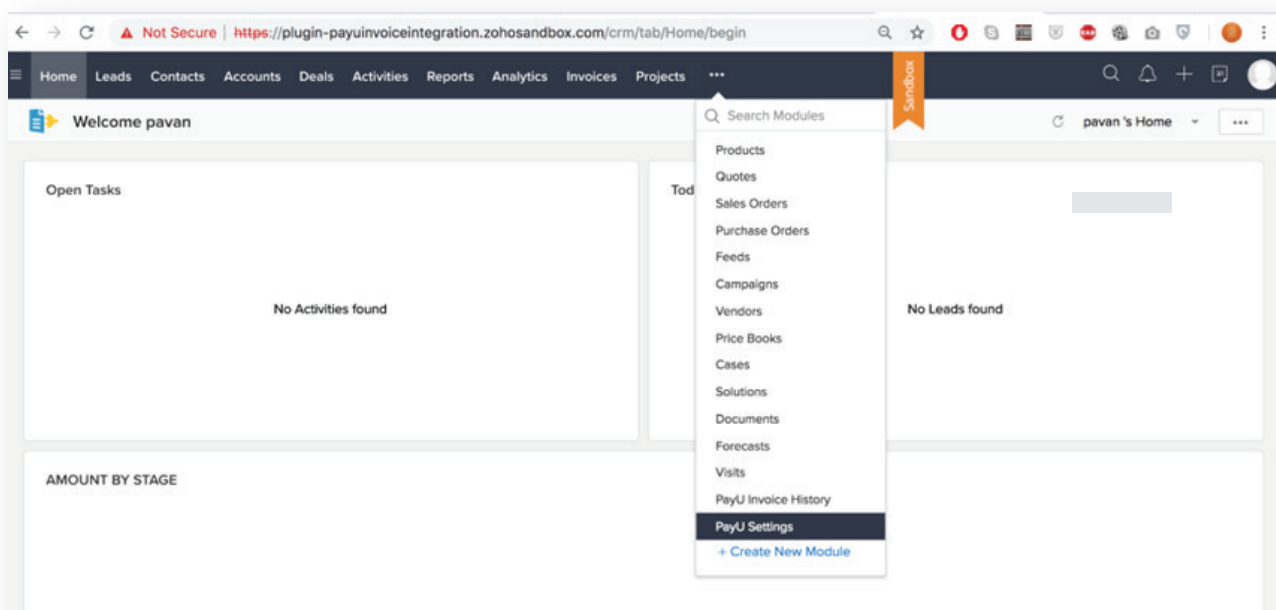
> Here's how you can find these details:

Merchant ID- Navigate to the top right of your PayU dashboard to your Profile tab. Under General details, you will find your Merchant ID

Merchant Salt and Merchant Key - Navigate to the Integration details tab on the top right of your dashboard. You will find your Merchant Key and Merchant Salt here.
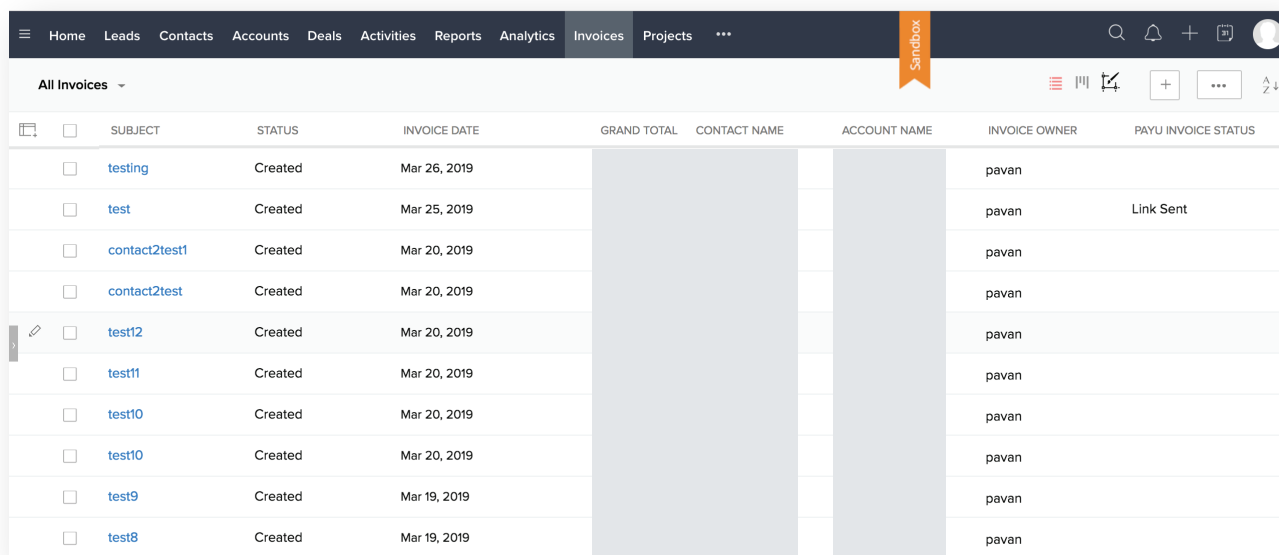
Collect Payments Directly On Your Zoho CRM Account

Once you have activated your PayU account on Zoho, you can collect payments in four simple steps:
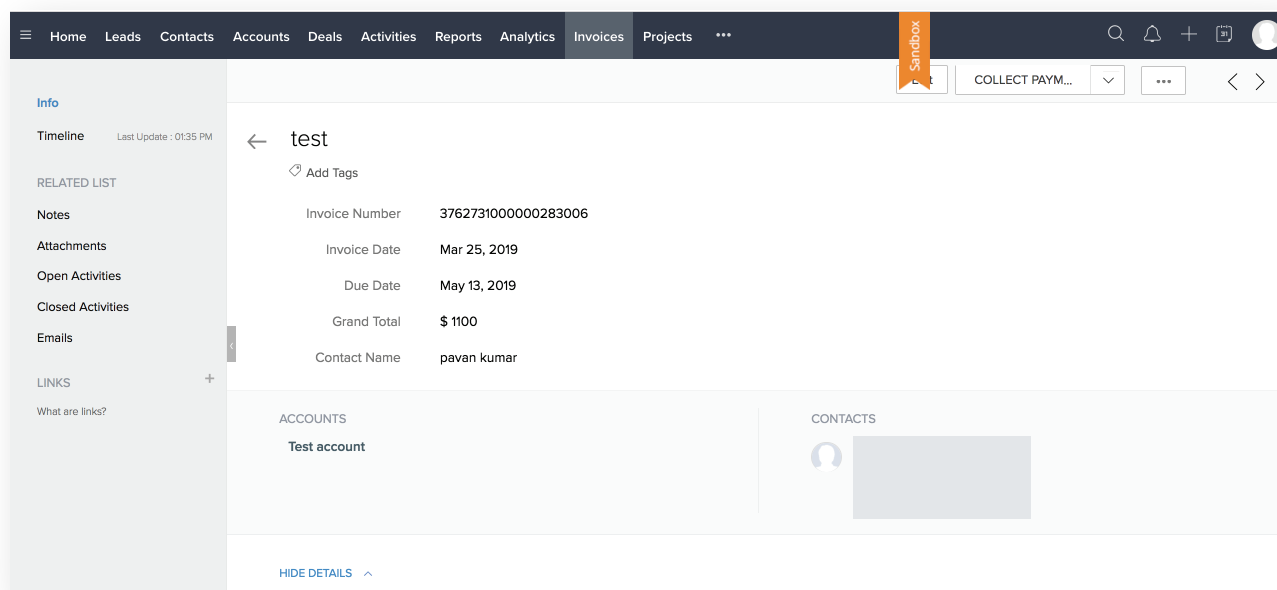
> Navigate to the 'Invoices' tab

> Click on the invoice for which you want to collect payment by sharing a payment link

> On the top right corner, find the 'Collect Payment' button.
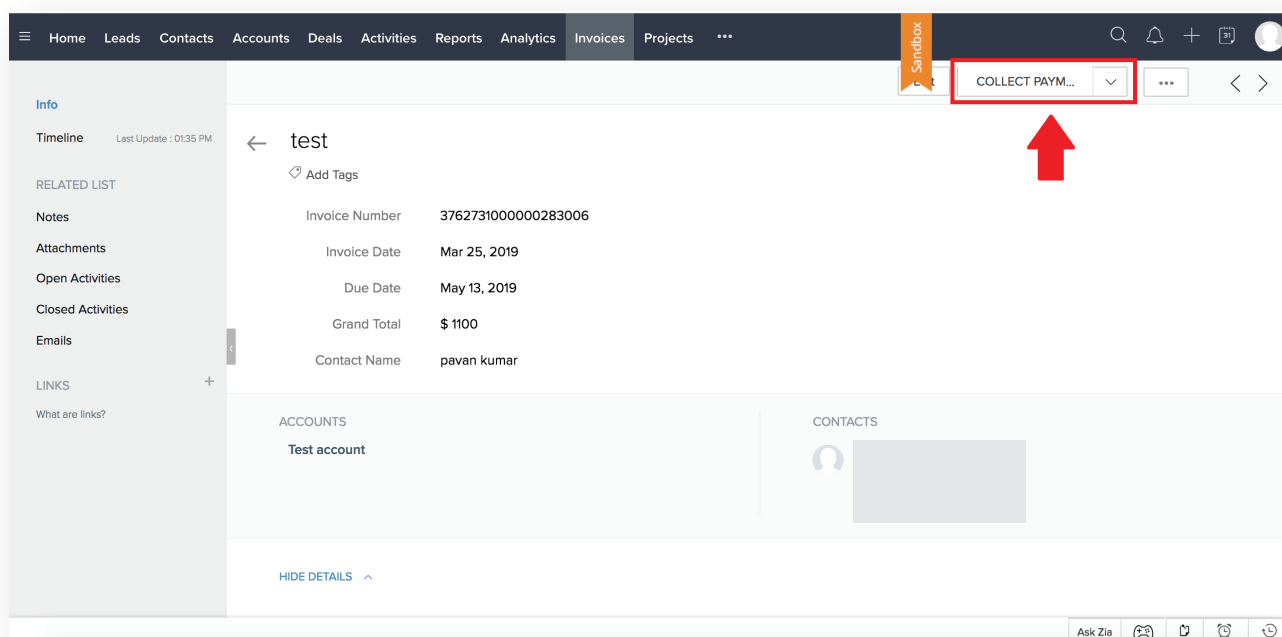
> Once clicked, an Email/ SMS will be sent to the end customer with a payment link!
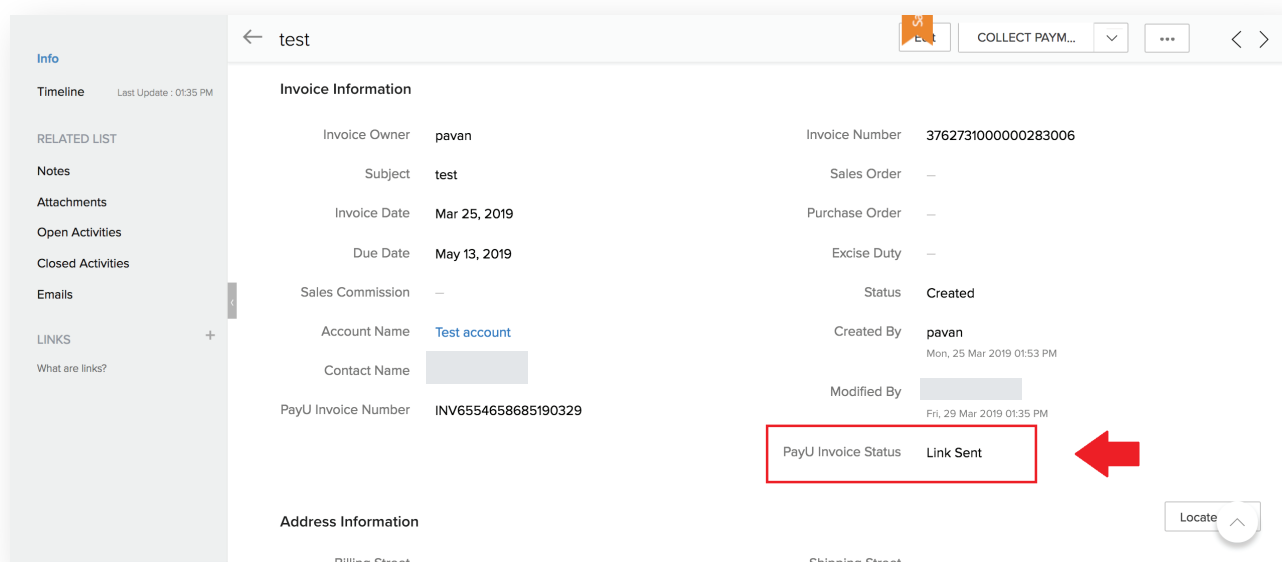
Your customer can click on the link and pay via any payment mode (Credit card, Debit card, Netbanking, UPI, Wallets) and money will come directly in your bank account

Now you can see the status of payment links for all your customers. Just navigate to the 'Invoices' section on your CRM dashboard, and add a column 'PayU invoice Status' by clicking on the top left side of the table.

The column will be added at the end of the invoices table.

Navigate to 'PayU Invoice History' section on your CRM Dashboard to check the status of all the PayU Payment links that you have shared to your customers.
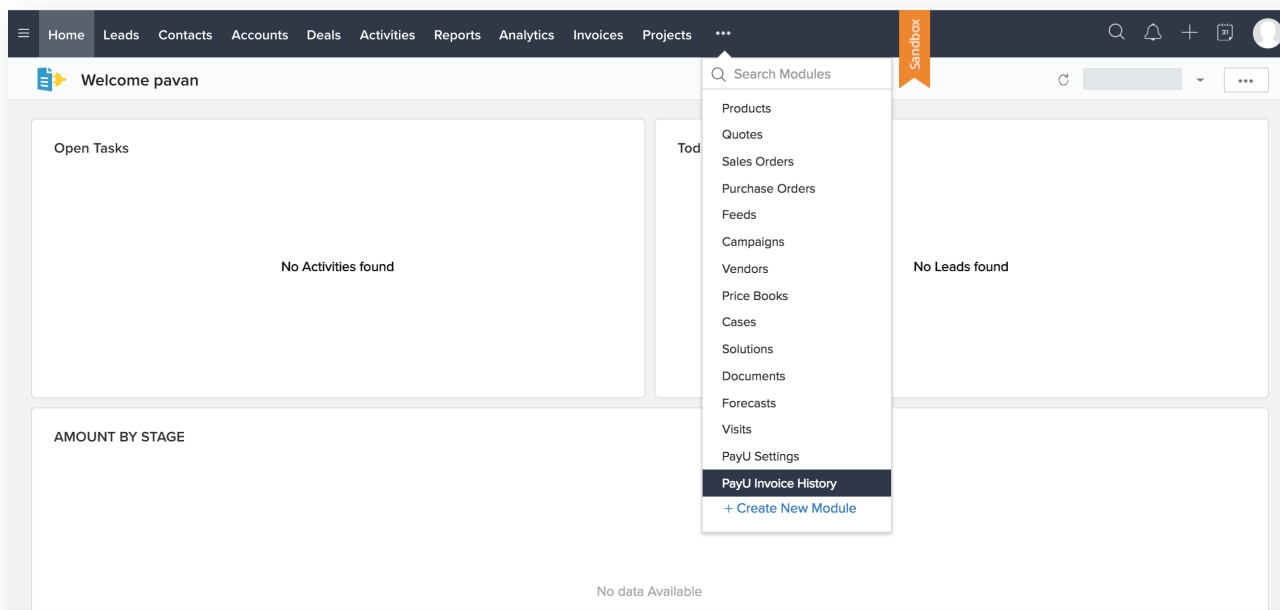
To view the payment links shared to a specific customer, you can navigate to 'Contacts' tab on your CRM dashboard and scroll to the bottom.

For any difficulty that you might face, please contact us and we will be happy to help you

Frequently Asked Questions (FAQs)

Q. How can I get started with accepting payments on ZOHO CRM via PayU?

To get started, you need to sign up on PayUmoney and activate your account:

> Create your PayU account **here**

> Connect your PayU account to your Zoho CRM.

Q. Where can I find my Merchant ID, Key & Salt details?

To find your merchant ID:

> Navigate to 'Profile' tab on top right corner of PayU dashboard

> Go to 'General Settings' and you will be able to locate your Merchant ID
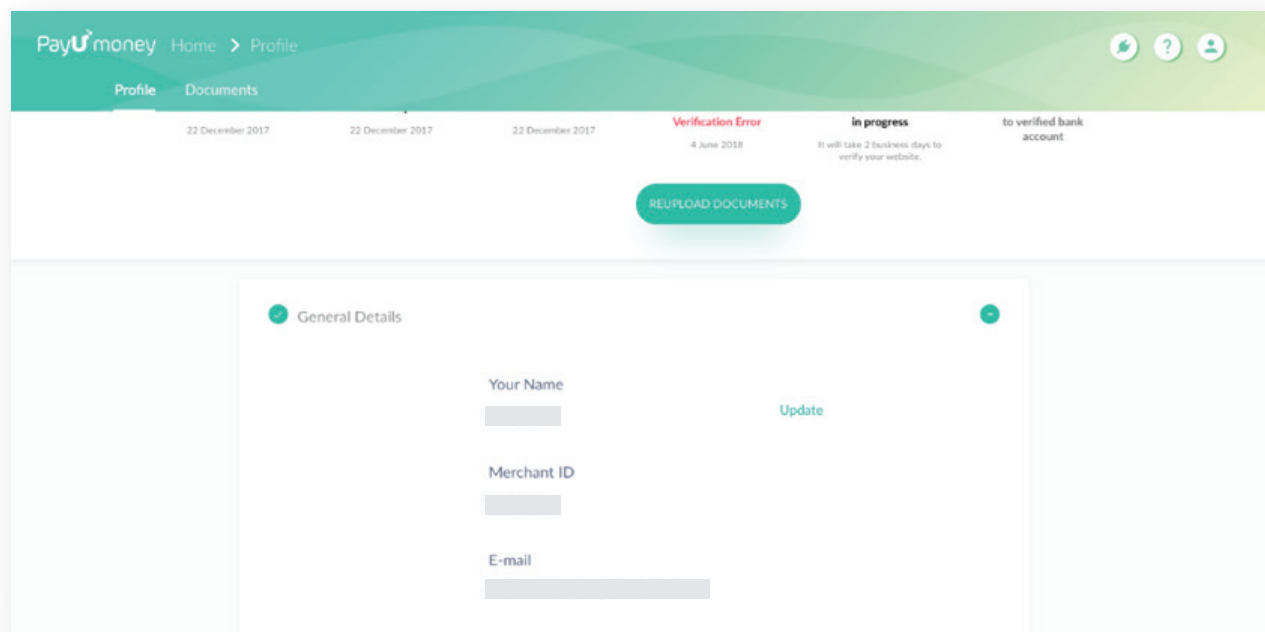
To find your Key & Salt Details:

Navigate to 'Settings' tab on top right corner of PayU dashboard

Go to 'Integration Details' and you will be able to find your details
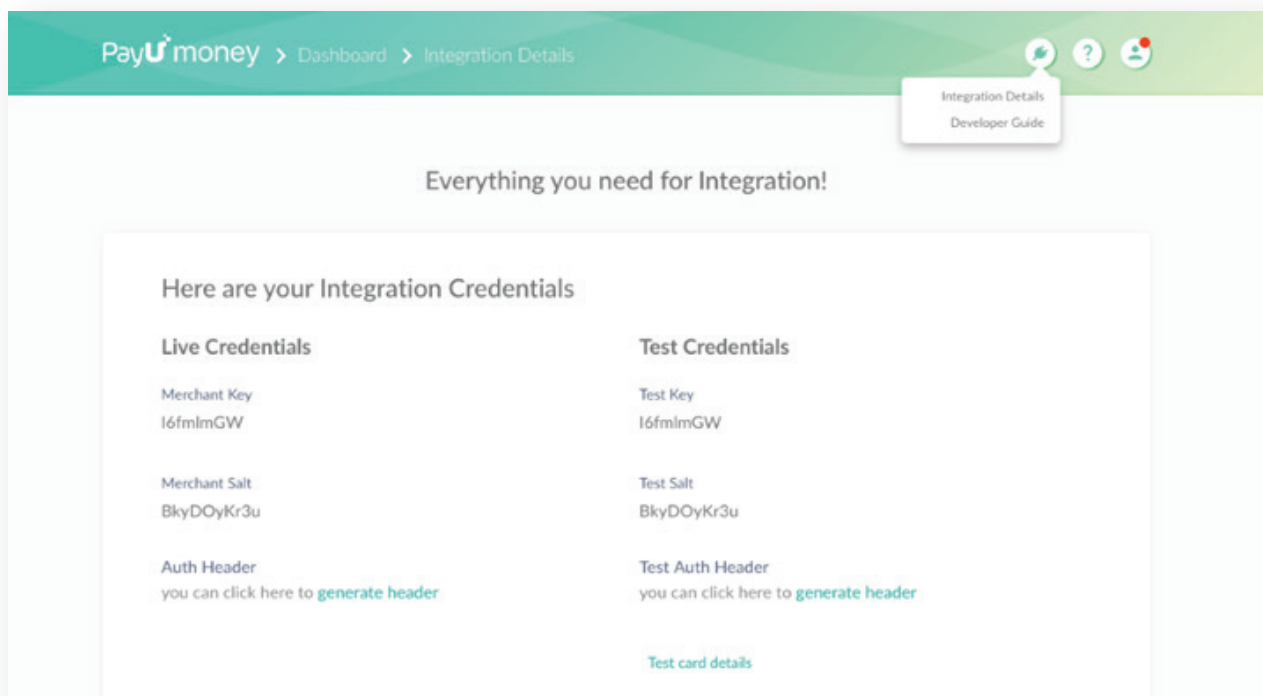
Q. What all payment modes are supported by PayU?

PayU supports Credit/ Debit cards, Net Banking, UPI and all major wallets.

Q. In case of any query on PayU + Zoho functionality, who should I reach out to?

You can raise your query to our experts through our **contact us** page. We'll be happy to assist you.

Q. Do I need a GST Number to be associated with PayUmoney?

No, you are eligible to set up an account on PayU without the GST number. Please note, you will not be able to avail the benefit of input credit on taxation of service charges until you submit your GST number with us.

Q. How long will it take to start accepting payments through PayUmoney?

With PayUmoney, you can start collecting payments right away after you sign

up. To receive your payments directly in your bank account, all you have to do is complete your profile and verify your bank account. It's that simple! Learn **How To Verify Your Bank Account on PayUmoney** by watching this video. Once verified, your payments will be automatically transferred to your bank account within 2 working days (excluding bank holidays).

Q. Where do I check the status of customer's payments?

You can check the status of your customer's payments and settlements directly from our dashboard. Please follow these steps:

> Login to your PayUmoney dashboard

> Click on 'Transactions'

You can 'Filter' the results by Transaction ID. Type, Date, Status & Source

A Quick Glossary:

> **Pending Payments:** Customer has started the payment but did not complete it

> **Successful & Settlement in Progress:** Customer has paid successfully and the payment is with PayU and will be settled into your bank account in 2 working days from the successful transaction date

> **Successful & Settlement Complete:** Customer has paid successfully and the payment is settled in your bank account

> **Failed Payment:** Customer did not complete the payment or payment failed

> **Cancelled By User:** Customer cancelled the transaction

> **Refund In Progress:** You have initiated refund on the transaction

> **Refund Completed:** Payment has been refunded to customer

PayU

India's Largest Payments Service Provider

Trusted by 4.5 Lakh + Businesses

www.payumoney.com

Sign up for free