



On



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	3
Getting started	4
<ul style="list-style-type: none">- Create your PayU account- Connect PayU account With Zoho CRM- Collect payments directly from your Zoho CRM account	
FAQs	15
A Quick Glossary	18

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

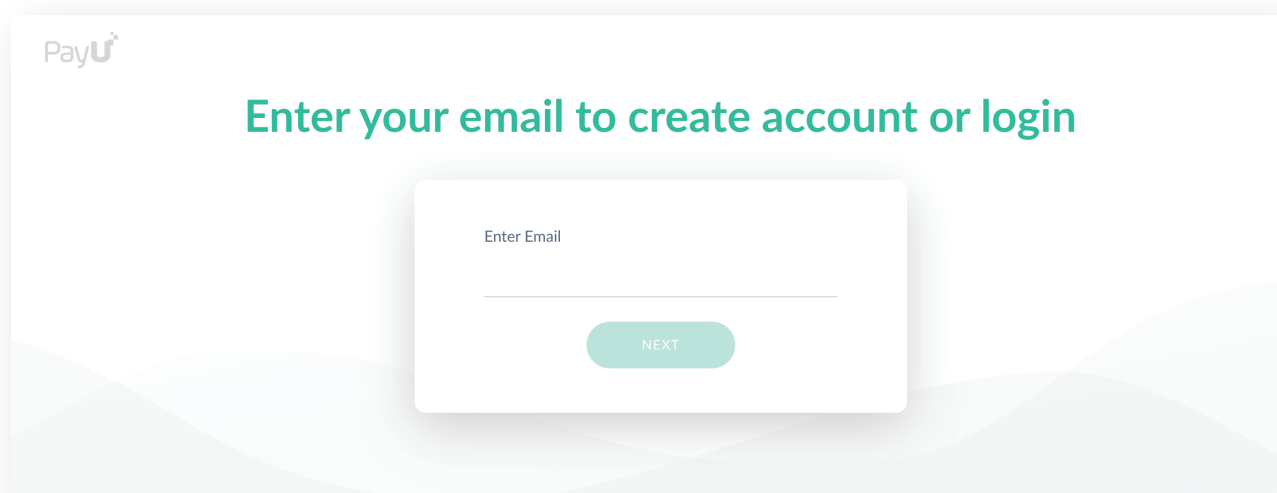
Create Your PayU Account

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

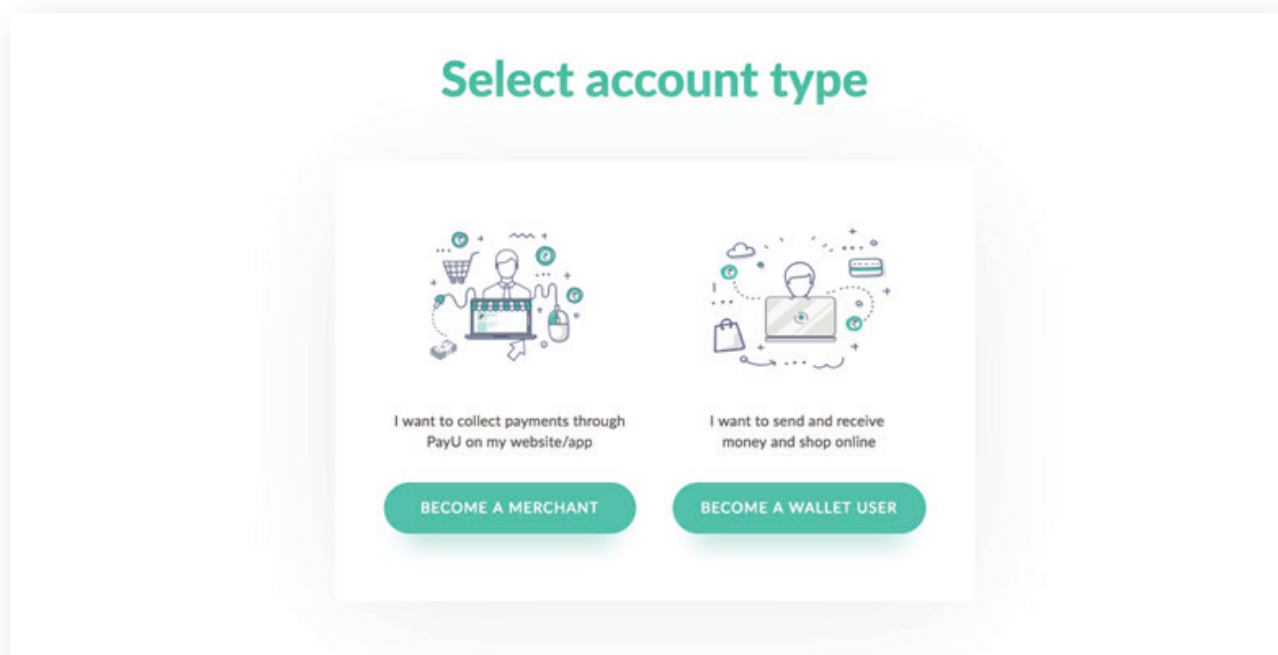
To simplify the process, let us divide it into 4 easy steps.

➤ Sign up on PayUmoney

Click [here](#) to sign up on PayUmoney

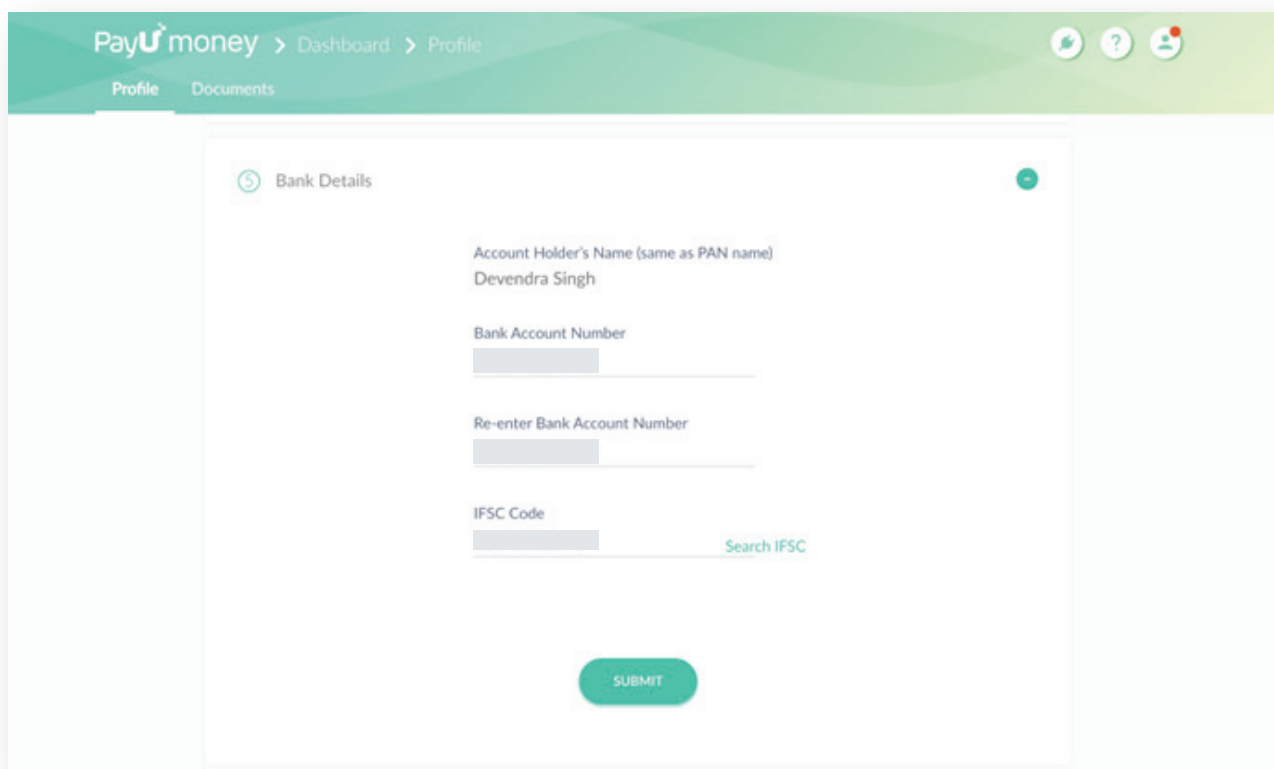
A screenshot of the PayU website's account creation or login page. The page has a white background with a light blue wavy pattern at the bottom. In the top left corner is the PayU logo. Centered on the page is a white rectangular box with rounded corners. Inside this box, at the top, is the text "Enter Email" in a small, grey font. Below this text is a horizontal line representing an input field. At the bottom of the box is a teal-colored button with the word "NEXT" in white, uppercase letters.

➤ Click on 'Become A Merchant'



➤ Complete your profile

Select the 'Complete Your Profile' option, enter your basic details and hit 'Submit'



PayU money > Dashboard > Profile

Profile Documents

Bank Details

Account Holder's Name (same as PAN name)
Devendra Singh

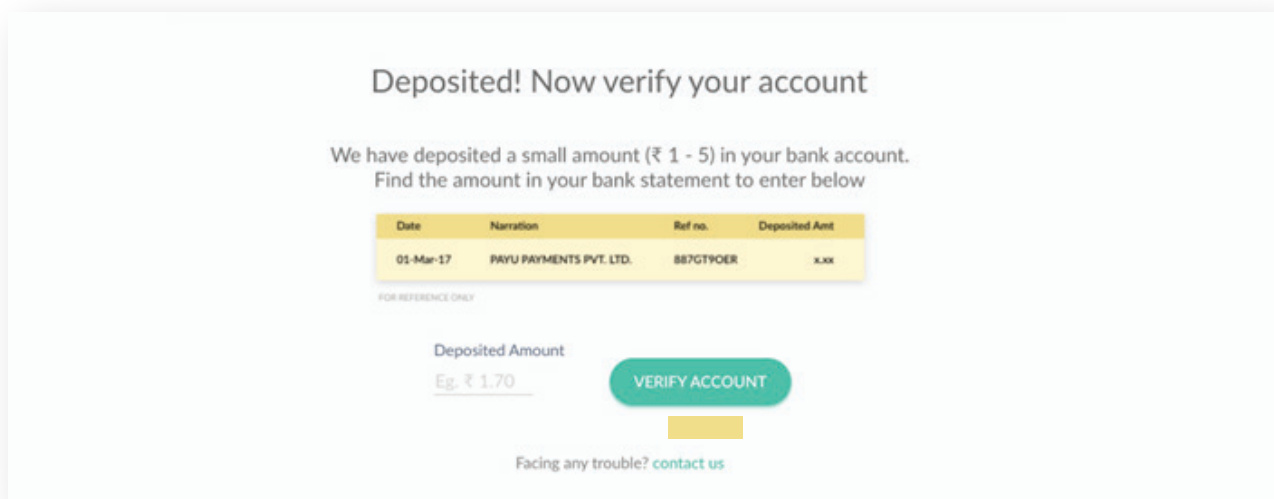
Bank Account Number

Re-enter Bank Account Number

IFSC Code
 [Search IFSC](#)

[SUBMIT](#)

A small amount will be deposited by 'PayU Payments Pvt. Ltd.' in your bank account



Deposited! Now verify your account

We have deposited a small amount (₹ 1 - 5) in your bank account.
Find the amount in your bank statement to enter below

Date	Narration	Ref no.	Deposited Amt
01-Mar-17	PAYU PAYMENTS PVT. LTD.	887GT9OER	₹ 1.70

FOR REFERENCE ONLY

Deposited Amount
Eg. ₹ 1.70

[VERIFY ACCOUNT](#)

Facing any trouble? [contact us](#)

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

Note: Although you can start collecting payments just after sign up, money will be transferred to your bank account only after successful bank verification. Learn more about ["How To Verify Your Bank Account On PayUmoney"](#) through this video.

> 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.

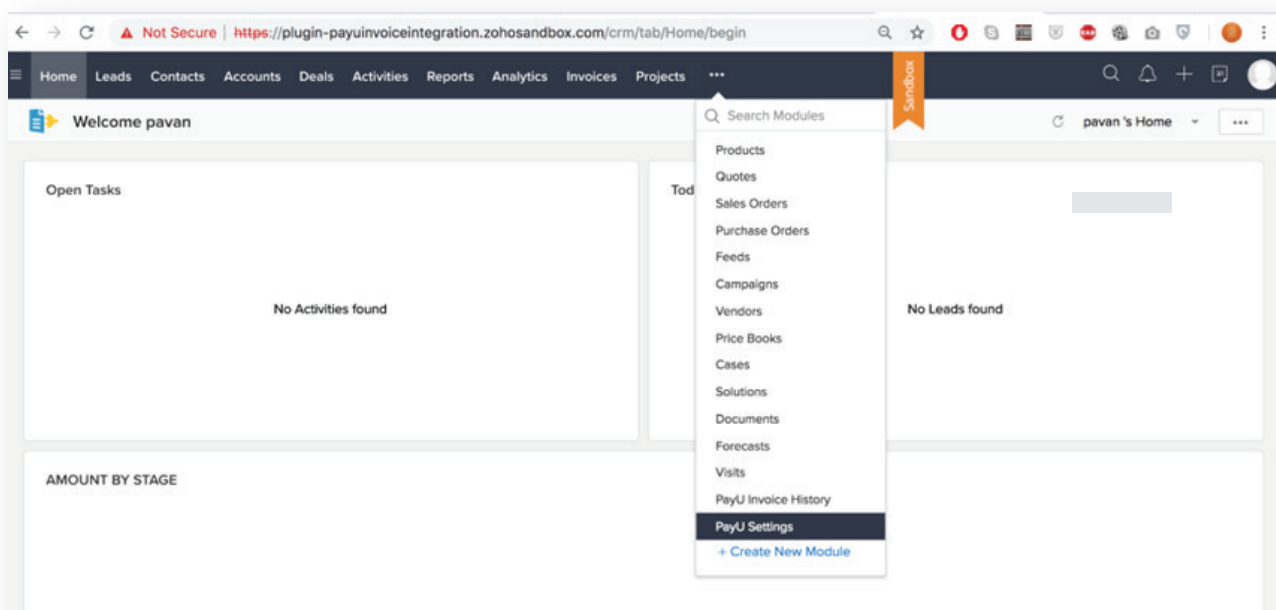
The screenshot shows the PayUmoney dashboard with the 'Documents' tab selected. The header includes the PayUmoney logo, navigation links for 'Dashboard' and 'Profile', and user icons. The main content area has a message: 'While we prepare your service agreement, you can start uploading documents to enable money transfer to your verified bank account'. Below this is a link: 'Learn how to create self attested copies'. The document upload section is divided into three rows, each with a document type, a file upload area, an 'Upload' button, and a file size note. The first row is for '1. PAN Card of', the second for '2. Address Proof of', and the third for '3. Bank Account Proof of'. Each row also includes a 'View accepted proofs' link.

Document Type	Action	File Size Note
1. PAN Card of	Upload	File size should be less than 5MB
2. Address Proof of	Upload	File size should be less than 5MB
3. Bank Account Proof of	Upload	File size should be less than 5MB

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

A screenshot of the 'Enter your PayUmoney Merchant Account details below' form in Zoho CRM. The form is titled 'Enter your PayUmoney Merchant Account details below' and contains three input fields: 'MERCHANT ID *', 'MERCHANT KEY *', and 'MERCHANT SALT *'. Each field has an information icon (i) to its right. Below the fields are two buttons: 'Submit →' and 'Edit ←'. At the bottom, there are two links: 'Do not have a PayUmoney account ? [Click Here](#) to create.' and 'Have any queries related to your PayUmoney account ? [Click Here](#) for help.'

➤ 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.

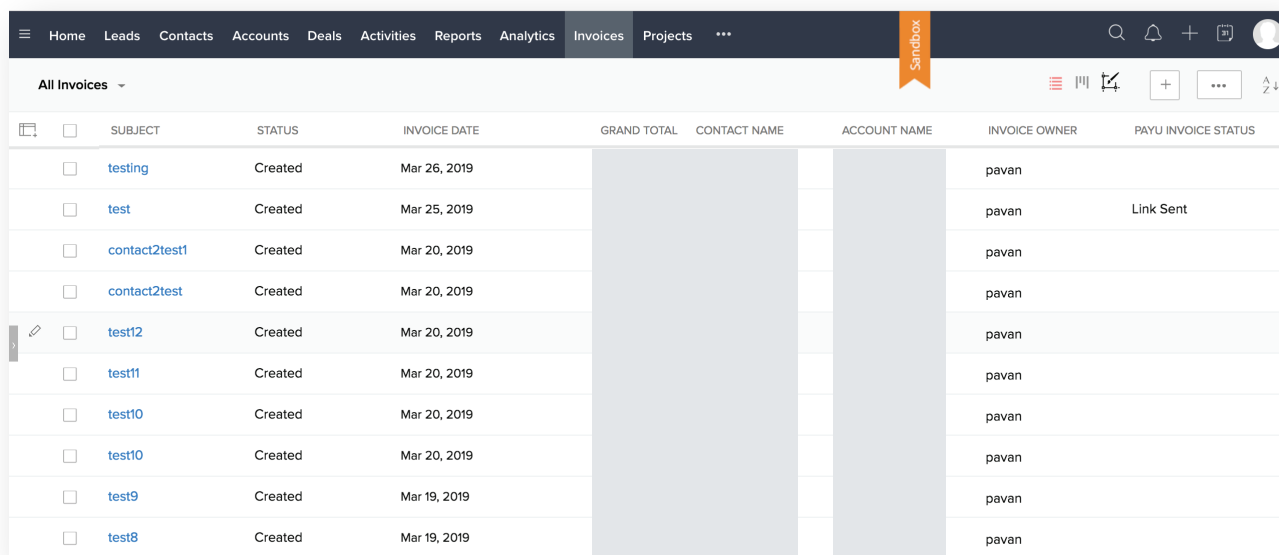
The screenshot shows the PayUmoney Profile page. The header includes the PayUmoney logo, navigation links (Home, Profile, Documents), and user icons. The main content area is titled 'General Details' and contains input fields for 'Your Name', 'Merchant ID', and 'E-mail'. An 'Update' button is located to the right of the 'Your Name' field. Above the 'General Details' section, there is a 'REUPLOAD DOCUMENTS' button and a verification status section with dates and a 'Verification Error' message.

The screenshot shows the PayUmoney Integration Details page. The header includes the PayUmoney logo, navigation links (Dashboard, Integration Details), and user icons. A dropdown menu is open, showing 'Integration Details' and 'Developer Guide'. The main content area is titled 'Everything you need for Integration!' and contains a section 'Here are your Integration Credentials'. This section is divided into two columns: 'Live Credentials' and 'Test Credentials'. The 'Live Credentials' column contains input fields for 'Merchant Key', 'Merchant Salt', and 'Auth Header' (with a link to 'generate header'). The 'Test Credentials' column contains input fields for 'Test Key', 'Test Salt', and 'Test Auth Header' (with a link to 'generate header'). A link for 'Test card details' is also present at the bottom.

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:

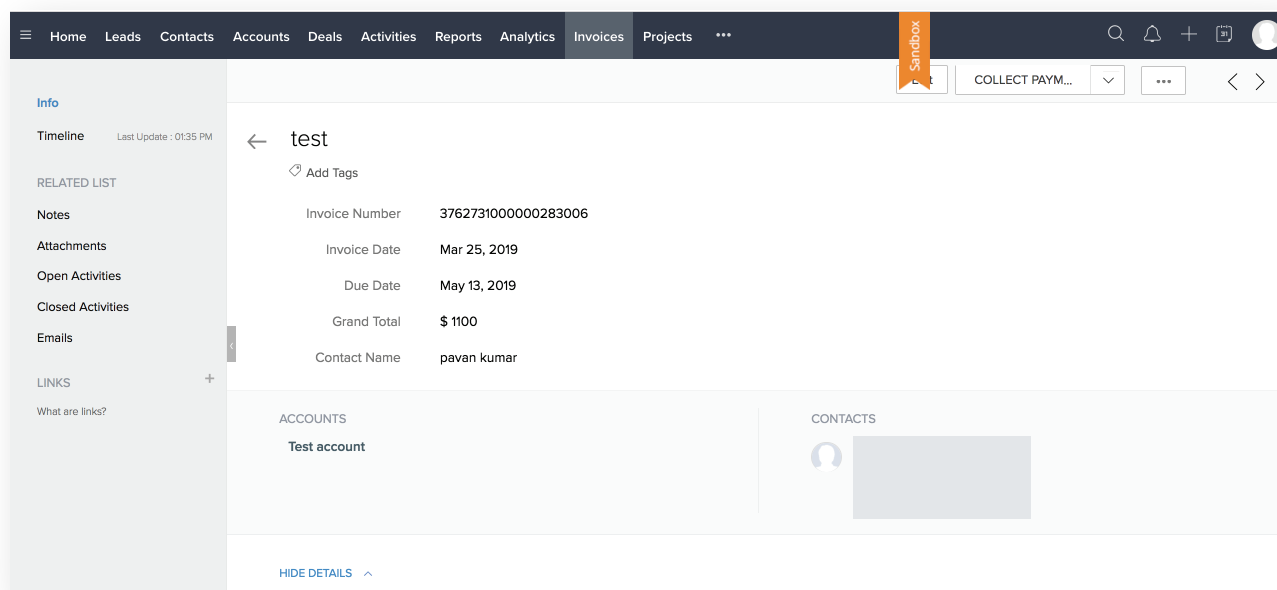
> Navigate to the 'Invoices' tab



The screenshot shows the Zoho CRM interface with the 'Invoices' tab selected. A table lists several invoices with columns for Subject, Status, Invoice Date, Grand Total, Contact Name, Account Name, Invoice Owner, and PAYU Invoice Status. The 'test' invoice is highlighted.

	SUBJECT	STATUS	INVOICE DATE	GRAND TOTAL	CONTACT NAME	ACCOUNT NAME	INVOICE OWNER	PAYU INVOICE STATUS
<input type="checkbox"/>	testing	Created	Mar 26, 2019				pavan	
<input type="checkbox"/>	test	Created	Mar 25, 2019				pavan	Link Sent
<input type="checkbox"/>	contact2test1	Created	Mar 20, 2019				pavan	
<input type="checkbox"/>	contact2test	Created	Mar 20, 2019				pavan	
<input type="checkbox"/>	test12	Created	Mar 20, 2019				pavan	
<input type="checkbox"/>	test11	Created	Mar 20, 2019				pavan	
<input type="checkbox"/>	test10	Created	Mar 20, 2019				pavan	
<input type="checkbox"/>	test10	Created	Mar 20, 2019				pavan	
<input type="checkbox"/>	test9	Created	Mar 19, 2019				pavan	
<input type="checkbox"/>	test8	Created	Mar 19, 2019				pavan	

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



The screenshot shows the Zoho CRM interface with the 'test' invoice selected. The left sidebar shows the 'Info' tab. The main content area displays the invoice details, including the invoice number, date, due date, grand total, and contact name. Below the details, there are sections for 'ACCOUNTS' and 'CONTACTS'.

Invoice Details:

- Invoice Number: 3762731000000283006
- Invoice Date: Mar 25, 2019
- Due Date: May 13, 2019
- Grand Total: \$ 1100
- Contact Name: pavan kumar

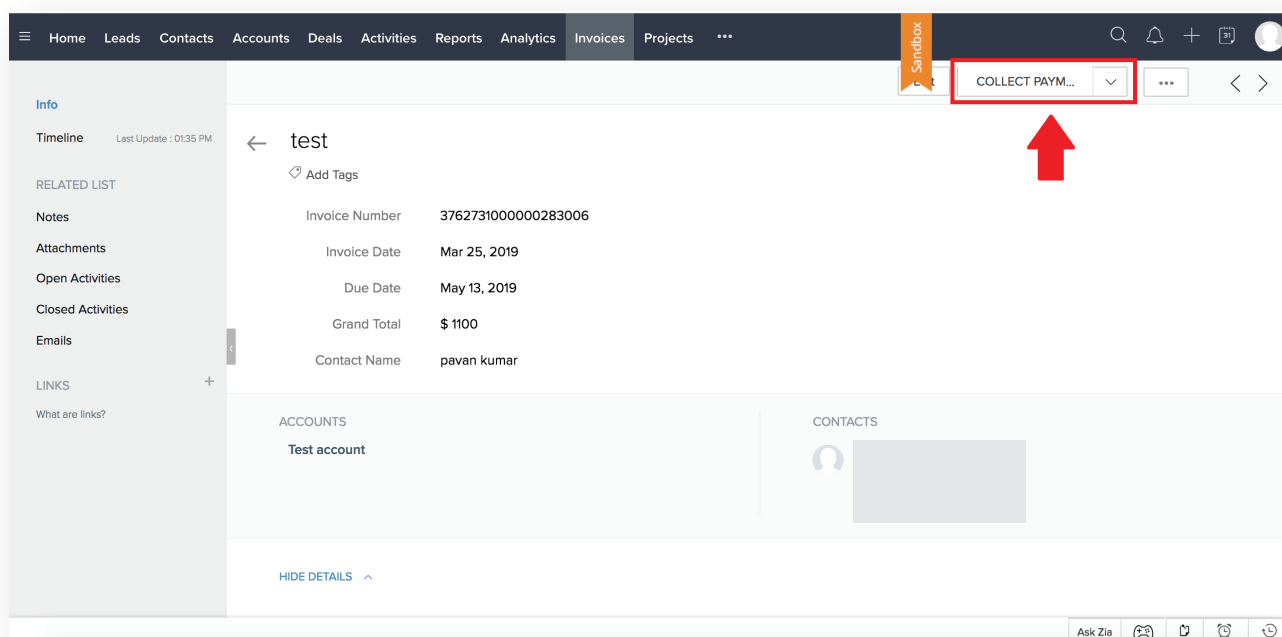
ACCOUNTS:

- Test account

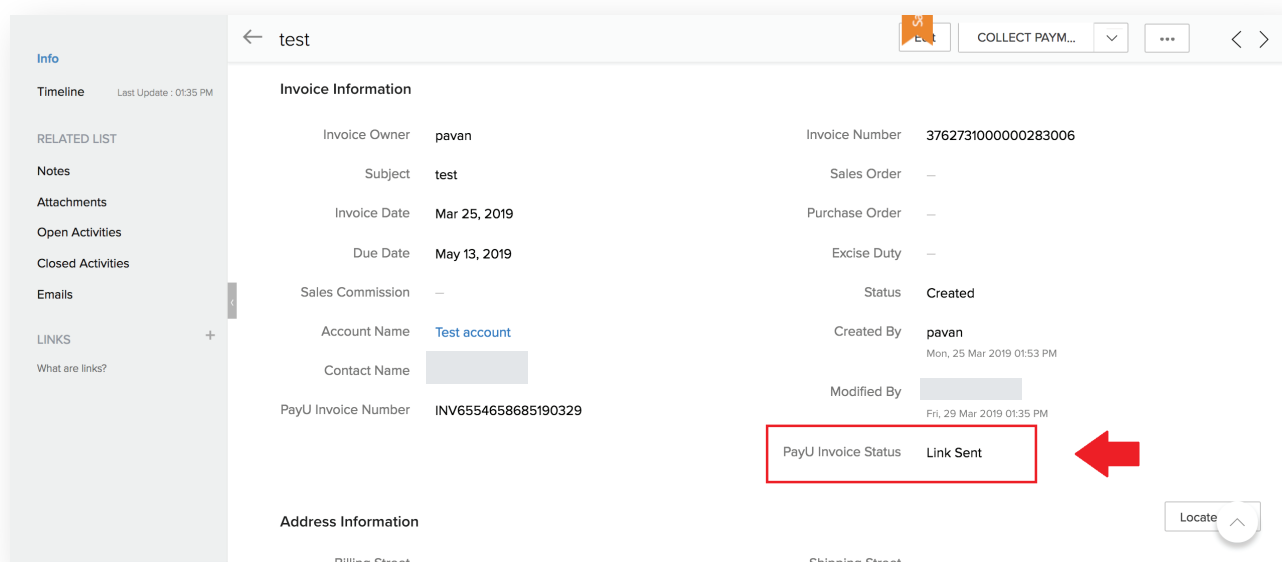
CONTACTS:

- [Contact Name]

- 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.

All Invoices -

10 Records Per Page < 1 to 10 >

Ask Zia

FILTER INVOICES BY		SUBJECT	STATUS	INVOICE DATE	GRAND TOTAL	CONTACT NAME	ACCOUNT NAME	INVOICE OWNER
<input type="checkbox"/> Touched Records	<input type="checkbox"/> Untouched Records	<input type="checkbox"/> Shipping City	Created	Mar 26, 2019	\$1,200.00			
<input type="checkbox"/> Record Action	<input type="checkbox"/> Related Records Action	<input type="checkbox"/> Billing State	Created	Mar 25, 2019	\$1,100.00			
<input type="checkbox"/> Subject	<input type="checkbox"/> Status	<input type="checkbox"/> Shipping State	Created	Mar 20, 2019	\$500.00			
<input type="checkbox"/> Invoice Date	<input type="checkbox"/> Grand Total	<input type="checkbox"/> Billing Code	Created	Mar 20, 2019	\$500.00			
<input type="checkbox"/> Contact Name	<input type="checkbox"/> Account Name	<input type="checkbox"/> Shipping Code	Created	Mar 20, 2019	\$900.00			
<input type="checkbox"/> Invoice Owner	<input type="checkbox"/> PayU Invoice Status	<input type="checkbox"/> Billing Country	Created	Mar 20, 2019	\$400.00			
<input type="checkbox"/> Adjustment	<input type="checkbox"/> Billing City	<input type="checkbox"/> Shipping Country	Created	Mar 20, 2019	\$600.00			
		<input type="checkbox"/> Terms and Conditions	Created	Mar 20, 2019	\$800.00			
		<input type="checkbox"/> Description	Created	Mar 20, 2019	\$500.00			
		<input type="checkbox"/> Discount	Created	Mar 20, 2019	\$300.00			
		<input type="checkbox"/> Tag						
		<input type="checkbox"/> PayU Invoice Number						
		<input type="checkbox"/> PayU Invoice Status						

Save Cancel

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

All Invoices -

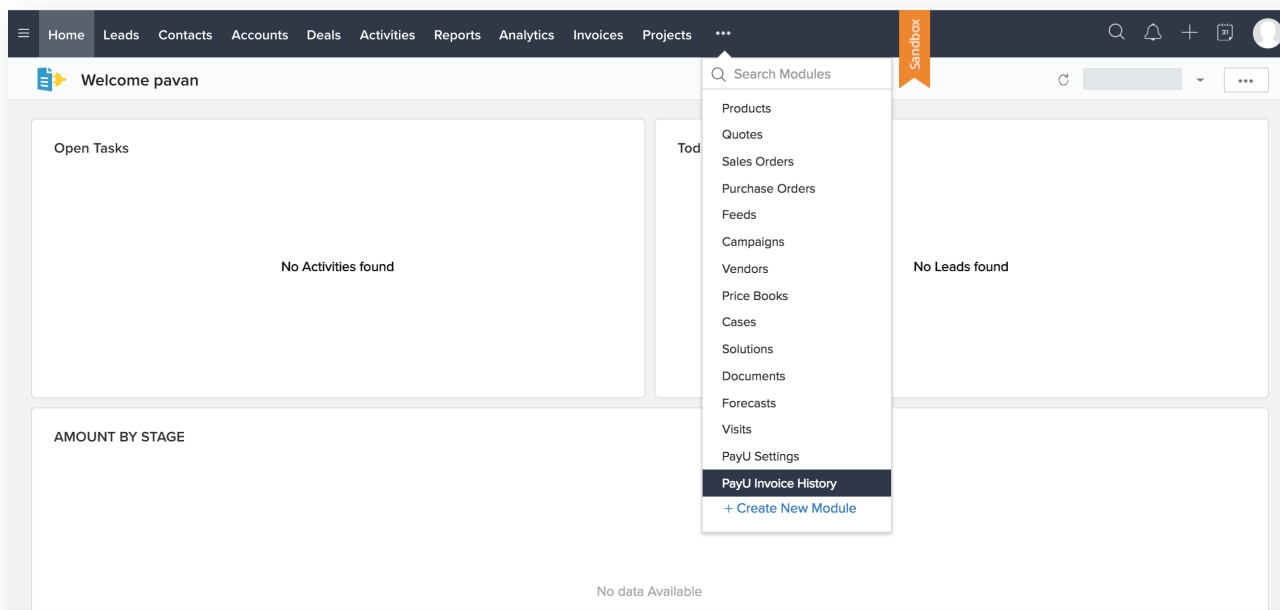
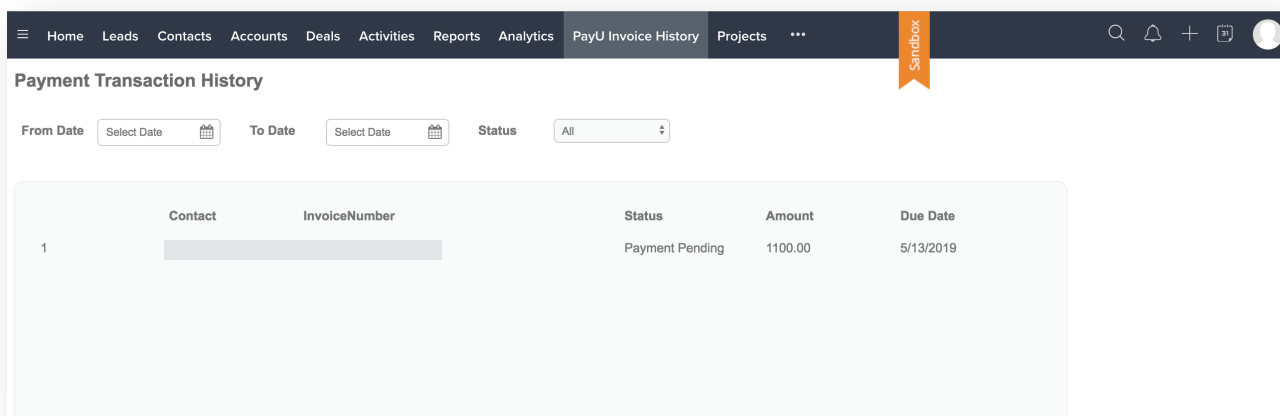
10 Records Per Page < 1 to 10 >

Ask Zia

	SUBJECT	STATUS	INVOICE DATE	GRAND TOTAL	CONTACT NAME	ACCOUNT NAME	INVOICE OWNER	PAYU INVOICE STATUS
<input type="checkbox"/>	testing	Created	Mar 26, 2019	\$1,200.00			pavan	
<input type="checkbox"/>	test	Created	Mar 25, 2019	\$1,100.00			pavan	Link Sent
<input type="checkbox"/>	contact2test1	Created	Mar 20, 2019	\$500.00			pavan	
<input type="checkbox"/>	contact2test	Created	Mar 20, 2019	\$500.00			pavan	
<input type="checkbox"/>	test12	Created	Mar 20, 2019	\$900.00			pavan	
<input type="checkbox"/>	test11	Created	Mar 20, 2019	\$400.00			pavan	
<input type="checkbox"/>	test10	Created	Mar 20, 2019	\$600.00			pavan	
<input type="checkbox"/>	test10	Created	Mar 20, 2019	\$800.00			pavan	
<input type="checkbox"/>	test9	Created	Mar 19, 2019	\$500.00			pavan	
<input type="checkbox"/>	test8	Created	Mar 19, 2019	\$300.00			pavan	

Total Count: 18

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.

The screenshot shows the 'Payment Transaction History' page. It features a navigation bar with 'PayU Invoice History' selected. Below the navigation bar, there are filters for 'From Date', 'To Date', and 'Status'. The main content area displays a table with the following data:

	Contact	InvoiceNumber	Status	Amount	Due Date
1			Payment Pending	1100.00	5/13/2019

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.

The screenshot displays the PayU CRM dashboard. The top navigation bar includes links for Home, Leads, Contacts, Accounts, Deals, Activities, Reports, Analytics, PayU Invoice History, and Projects. The left sidebar shows a list of related items: Info, Timeline (Last Update: 48 day(s) ago), Notes, Attachments, Deals, Open Activities, Closed Activities, Products, Invited Events, Cases, Quotes, Sales Orders, Purchase Orders, Emails, and Invoices (10+). The main content area shows the 'Contacts' tab selected, displaying a contact profile for 'Mr. pavan kumar - Test ac...'. Below the profile, the 'Payment Transaction History' is shown as a table with the following data:

	Contact	InvoiceNumber	Status	Amount	Due Date
1			Payment Pending	1100.00	5/13/2019

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?

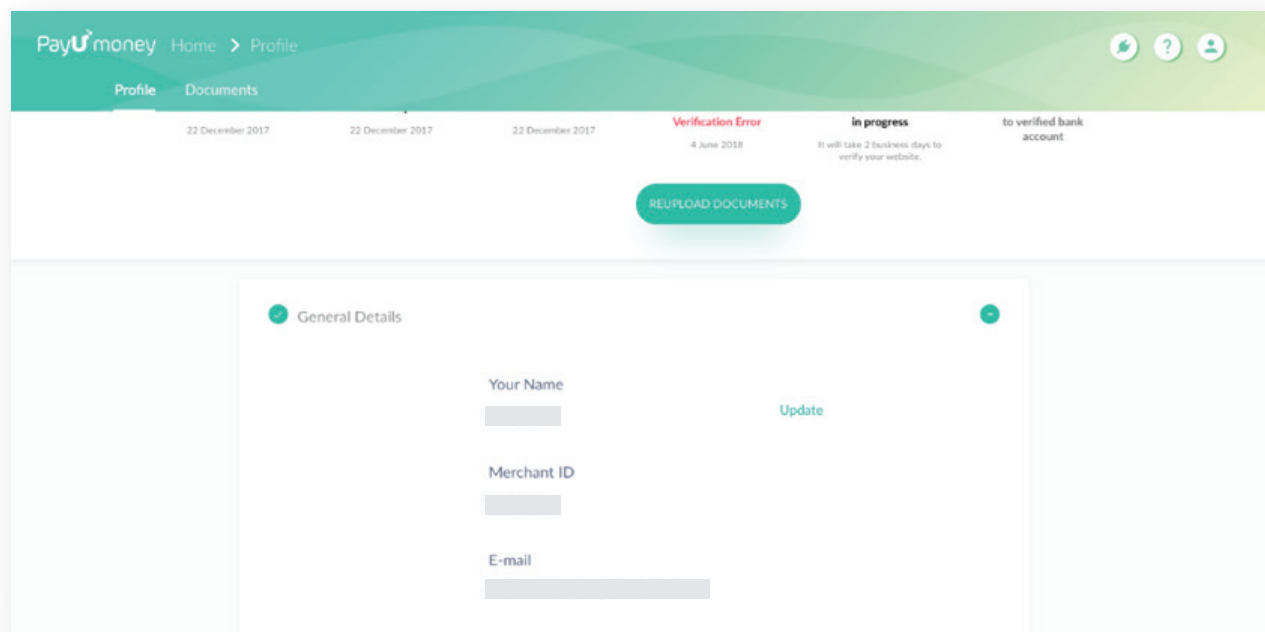
To get started, you need to sign up on PayUmoney and activate your account:

- 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:

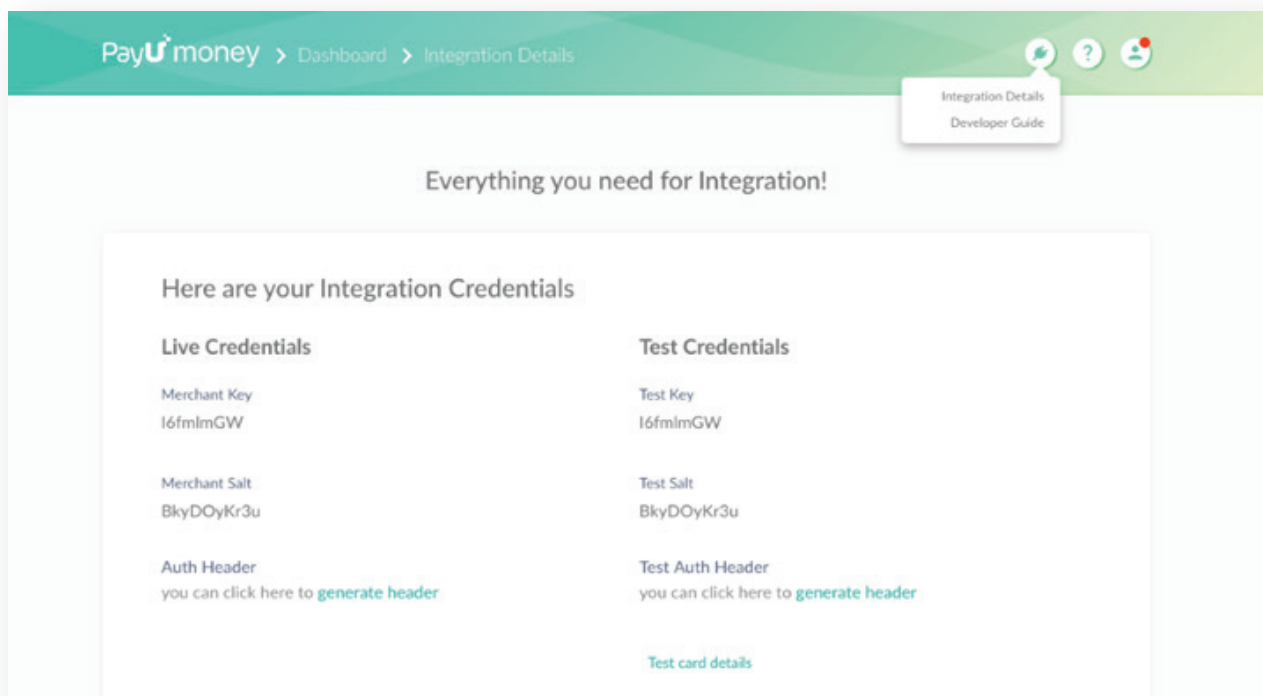
- Navigate to 'Profile' tab on top right corner of PayU dashboard
- Go to 'General Settings' and you will be able to locate your Merchant ID



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'

The screenshot shows the PayUmoney dashboard. The header has a green bar with the PayUmoney logo and navigation links: Transactions, Settlements, Payment Requests, Buttons, Tools. There is a 'Live mode' toggle and user icons. The left sidebar has 'Collect Payments' and 'CLEAR TAX' sections. The main content area shows a summary of 10 total transactions with a total amount of 5000 INR, and a table of transaction details.

Date	Txn. Id.	Reference	Cust. Email	Amount (₹)	Status
19 Jan 17 11:51 AM	1234567890	KTU7-ZAUOSPZ	firstname.lastname...	₹ 20,00,000	User Cancelled
19 Jan 17 11:51 AM	1234567890	KTU7-ZAUOSPZ	firstname.lastname...	₹ 20,00,000	Successful & Settlement...
19 Jan 17 11:51 AM	1234567890	KTU7-ZAUOSPZ	firstname.lastname...	₹ 20,00,000	User Cancelled
19 Jan 17 11:51 AM	1234567890	KTU7-ZAUOSPZ	firstname.lastname...	₹ 20,00,000	Successful & Settlement...

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

-
- **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



India's Largest Payments Service Provider

Trusted by 4.5 Lakh + Businesses

www.payumoney.com

Sign up for free