

Razorpay Payment Connector for Creatio

**User Guide**

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# Razorpay Connector in Creatio - Sales

## Overview

The Razorpay payment connector integration into Creatio Sales CRM, facilitates seamless payment of invoices by connecting with Razorpay, enabling direct payment initiation and processing.

## Business Use Case

Previously, payments occurred outside the system via invoicing, requiring manual updates by the sales team post the payment is made.

To enhance efficiency:

1. We've integrated a custom payment button with Razorpay.
2. Now, sales can click on the payment button and share the payment link via SMS and email.
3. Once the customer pays through the link, the invoice status automatically updates to "paid" eliminating manual intervention and simplifying the process.

## Solution Benefits

The following points explain how the Razorpay payment plugin contributes to sales orders:

1. Providing customers with a direct payment link via SMS and email makes the process more convenient and seamless.
2. Customers can easily initiate payments, leading to quicker settlements and a positive experience.
3. Automating the payment status update eliminates the need for salesperson involvement, saving valuable time and resources.
4. The streamlined process reduces administrative tasks, allowing the sales team to focus on higher-value activities, ultimately boosting productivity.

# Prerequisites

## Guide For Using Utility

First, you need to install the plugin from the **Creatio marketplace.**

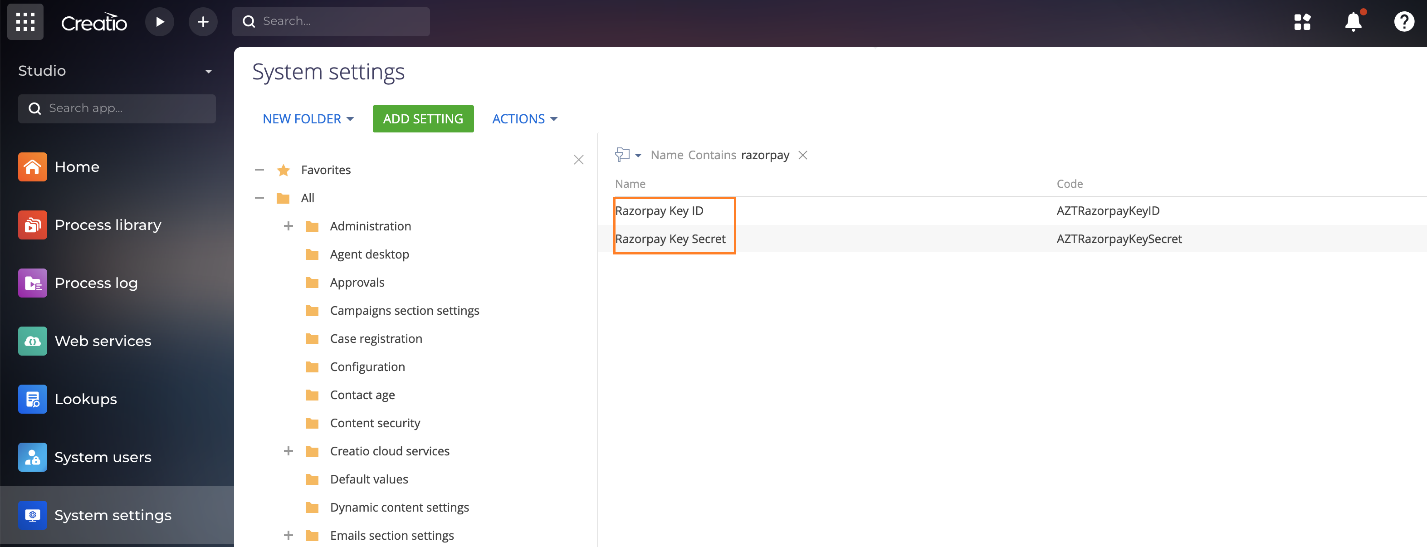
Once the Plugin is installed, you need to perform the make the following changes in Creatio.

1. Update System Settings
2. Add Reference Code Mask ID
3. Create Razorpay Webhook

## Update System Settings

To update the System settings, do the following:

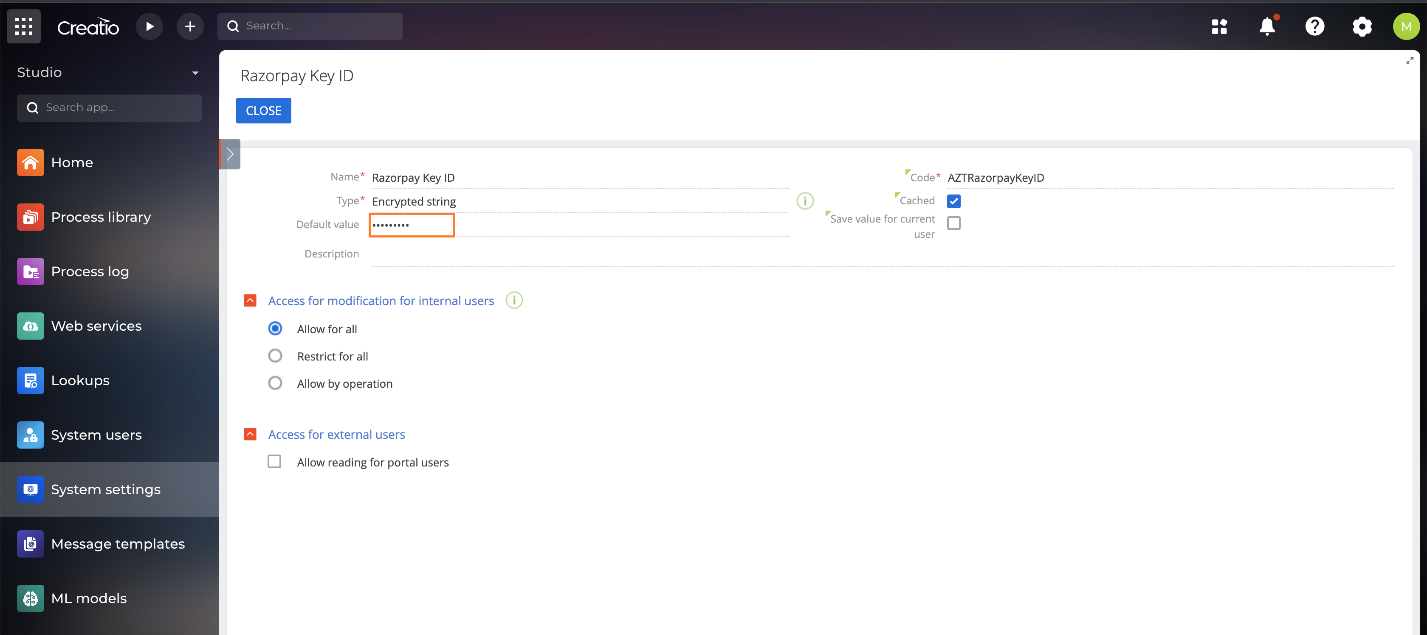
1. Access the **System Settings** in your application.



1. Use the search function within System Settings to find **Razorpay Key ID**.

The Razorpay Key ID page appears.

1. In the **Default value** box, enter **Live Razorpay Key ID**, obtained from your Razorpay account.



1. Similarly, use the search function to locate **Razorpay Key Secret**.
2. Enter your **Key Secret** for Razorpay.
3. Save the settings once you have provided both the Key ID and Secret.

## Add Reference Code Mask ID in the Lookup

To add the reference code mask ID in the lookup, do the following:

1. Navigate to the **Lookups** section.
2. Search for **Reference Code Mask:** Use the Lookup search functionality to locate the **Reference Code Mask**.
3. In the **Code Mask** box, replace the existing code mask with four alphabetical characters which will be used as reference ID while generating payment link.

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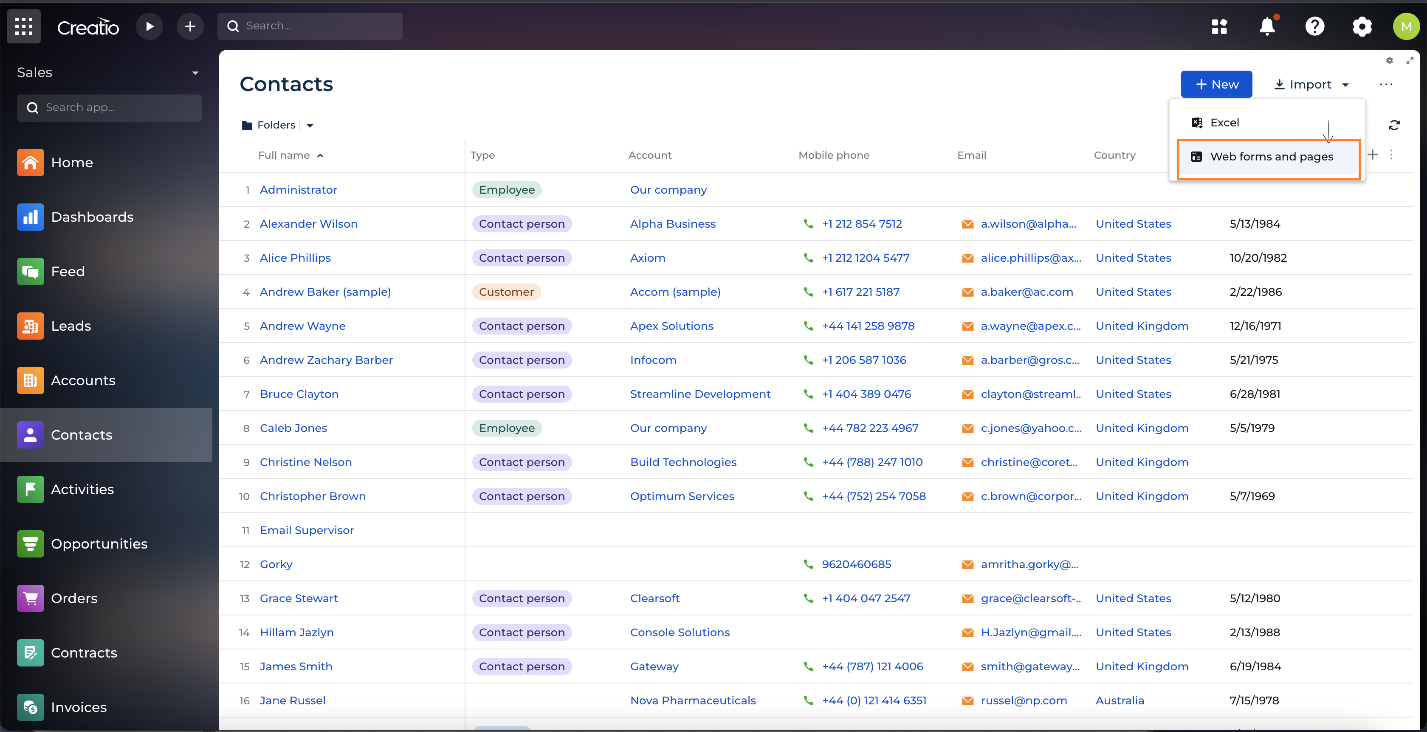
1. Click **** to save the code mask.

## Create Razorpay Webhooks

You can use Razorpay Webhooks to configure and receive notifications when a specific event occurs. When one of these events is triggered, we send an HTTP POST payload in JSON to the webhook's configured URL.

**Setting up the webhook connection between the Creatio instance and Razorpay:**

1. Navigate to the **Contact** section within your **Creatio** instance.
2. Click **Import** and choose **Web Forms and Pages**.



The Web forms and pages page appears.

1. Click **Click to get your API Key.**

A screenshot of a web page

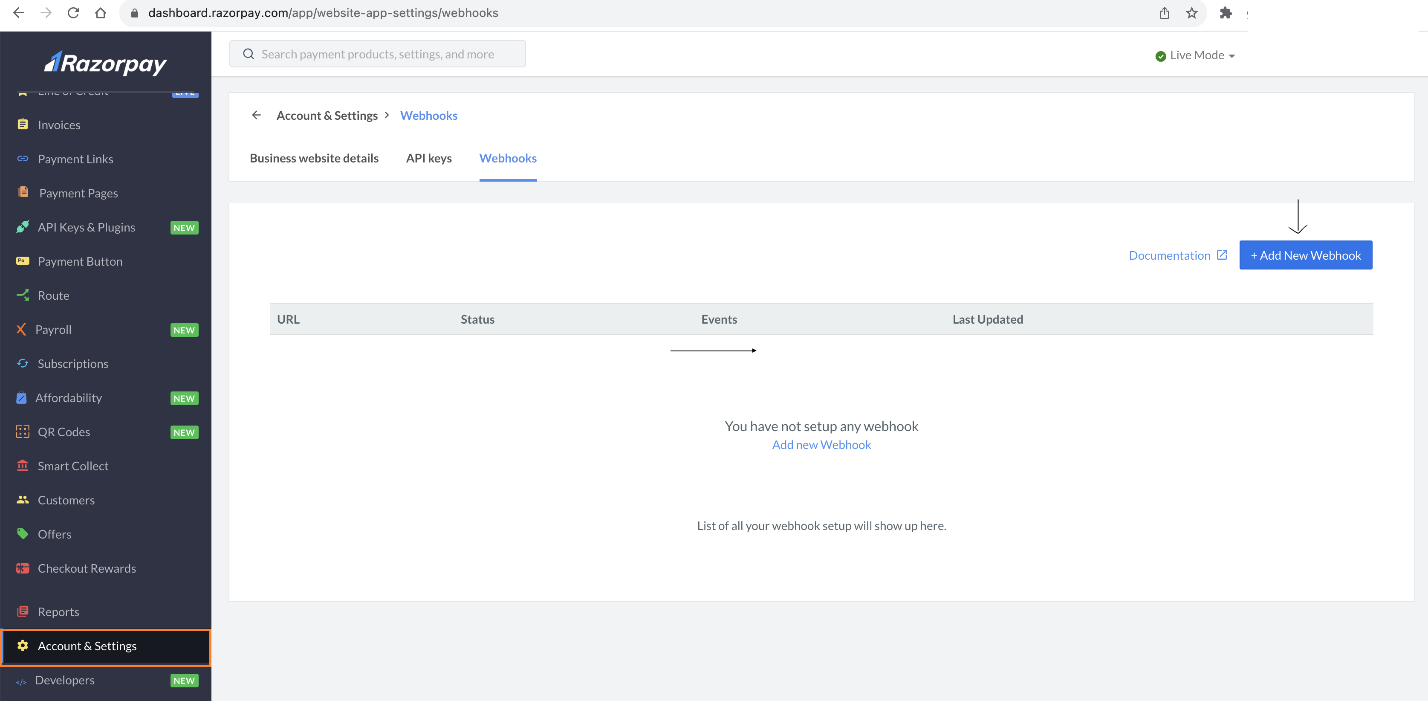
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The API key appears.

1. Click  to copy the API key.

Add this URL with your API key in the Razorpay Webhook URL box: <https://webhooks.creatio.com/webhooks/>{API\_KEY}

1. Navigate to <https://dashboard.razorpay.com/>.
2. In the left pane, choose **Account & Settings**.



The Account and product settings page appears.

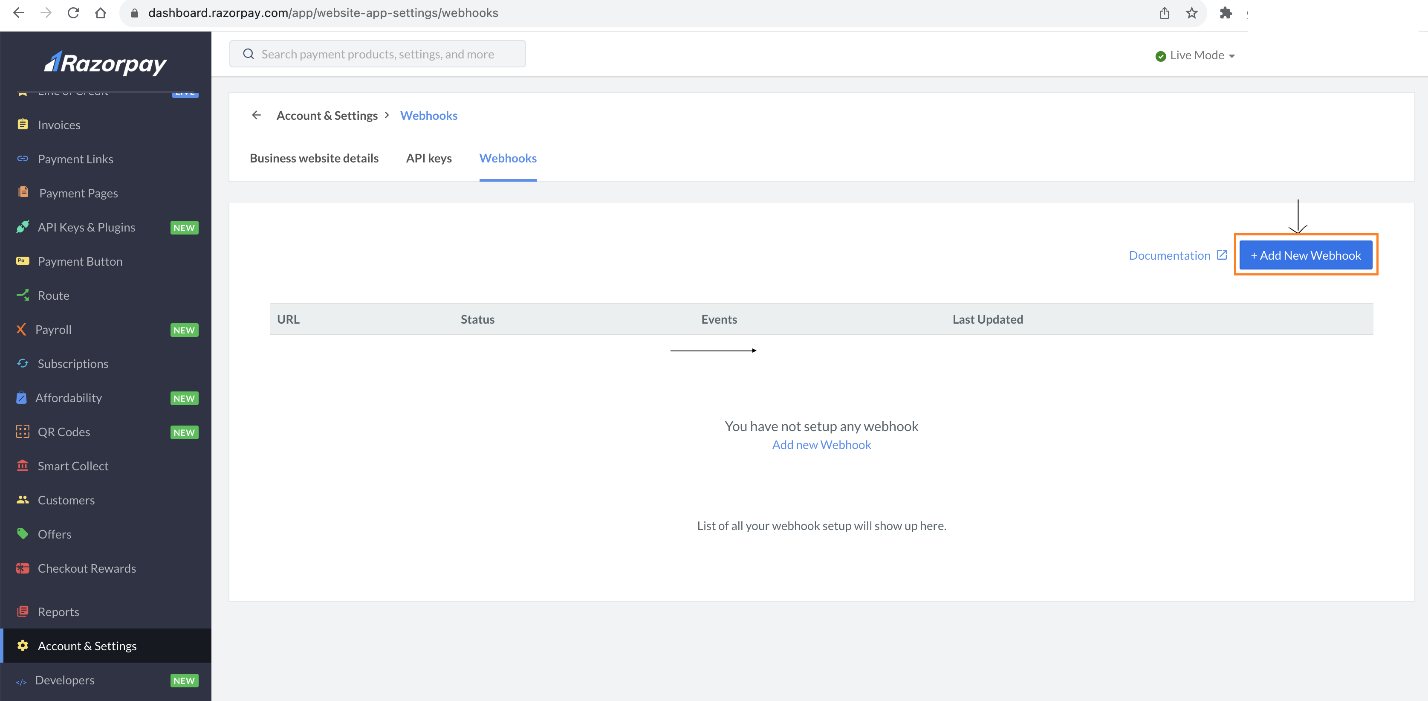
1. In the **Website and app settings** section, choose **Webhooks**.

A screenshot of a computer

Description automatically generated

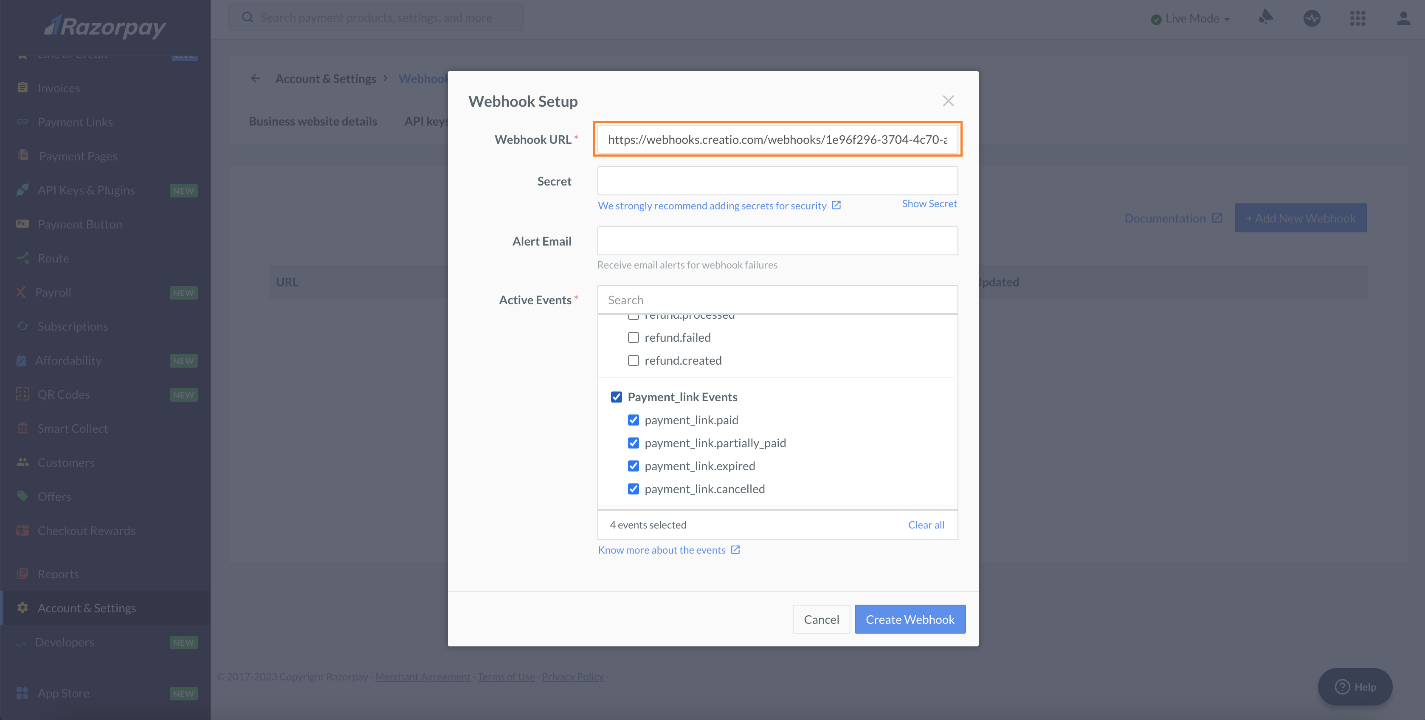
The Webhooks page appears.

1. Click **Add New Webhook**.



The Webhook Setup page appears.

1. In the **Webhook** **URL** , provide the webhook URL copied in step 4.



1. In the **Active Events** section, select all four payment link options available under **Payment\_link Events**:
2. payment\_link.paid
3. payment\_link.partially\_paid
4. payment\_link.expired
5. payment\_link.cancelled
6. Click **Create Webhook** to finalize the set up.

The webhook connection between Creatio and Razorpay is now set up.

# Getting Started

## Payment Status

Now, the following payment statuses are reflected in your invoice for the order you placed:

1. **Canceled:** The payment has been canceled and no money transferred.
2. **Draft:** The payment is still being made and has not been processed.
3. **Paid:** The full amount of the payment has been received.
4. **Partially Paid:** Only part of the payment has been received.
5. **Unpaid:** No payment has been received.

## Using Payment Option

The Payment option is available only for the Invoices. There are two options to access the invoice, one from the Order and another Invoice section.

**To request for the Payment from the existing Order**

1. In the **Sales** page, click **Orders**.

A screenshot of a phone

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The Orders page appears.

A screenshot of a computer

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1. Open the required order for which you want to request **PAYMENT**.

The selected order page appears.

A screenshot of a computer

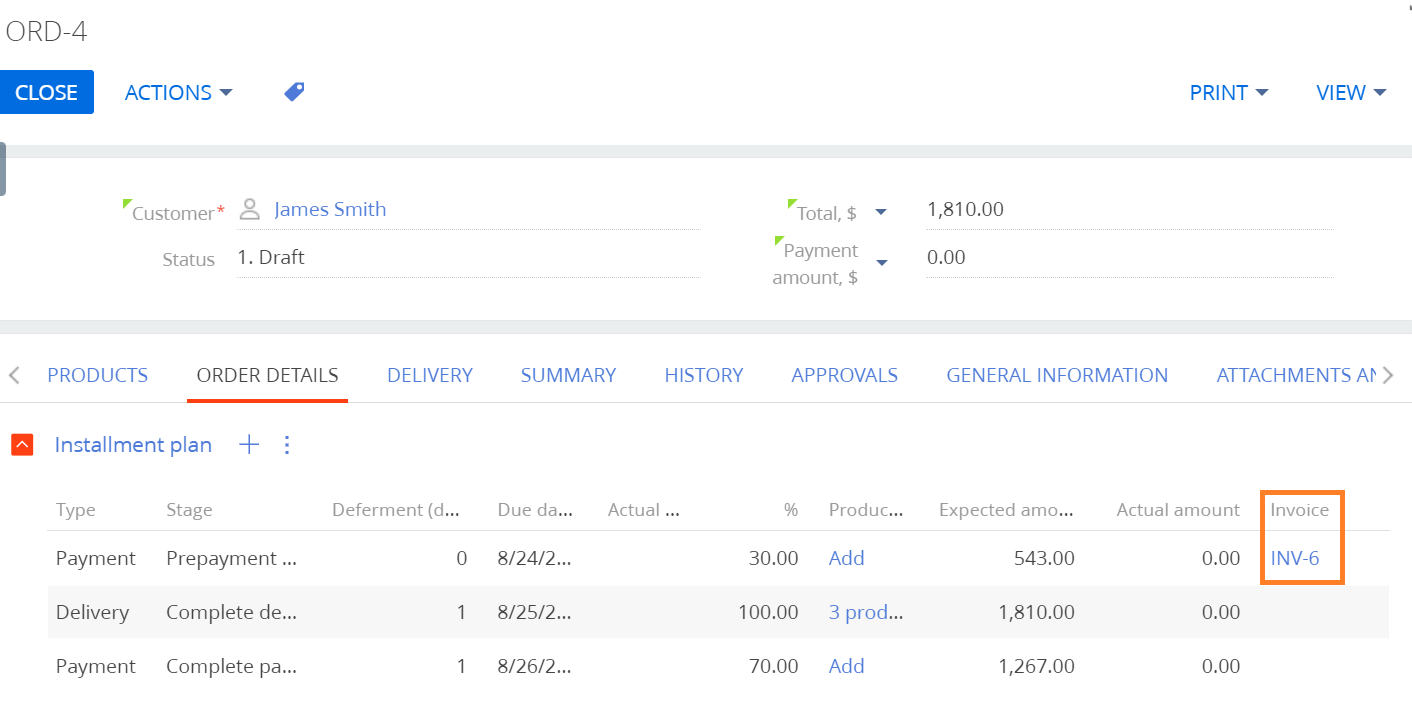
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1. Click the **ORDER DETAILS** tab.

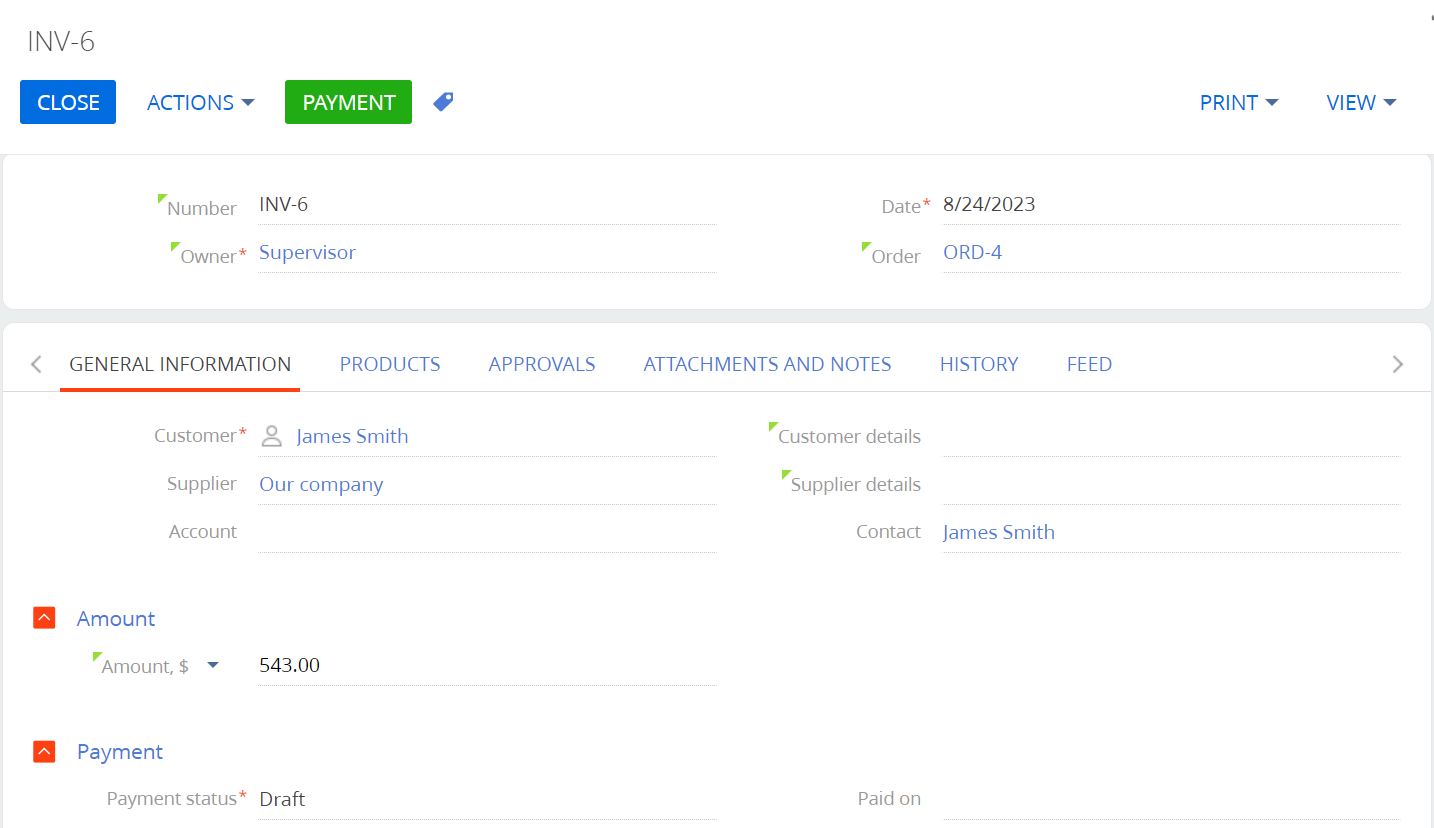
A screenshot of a computer

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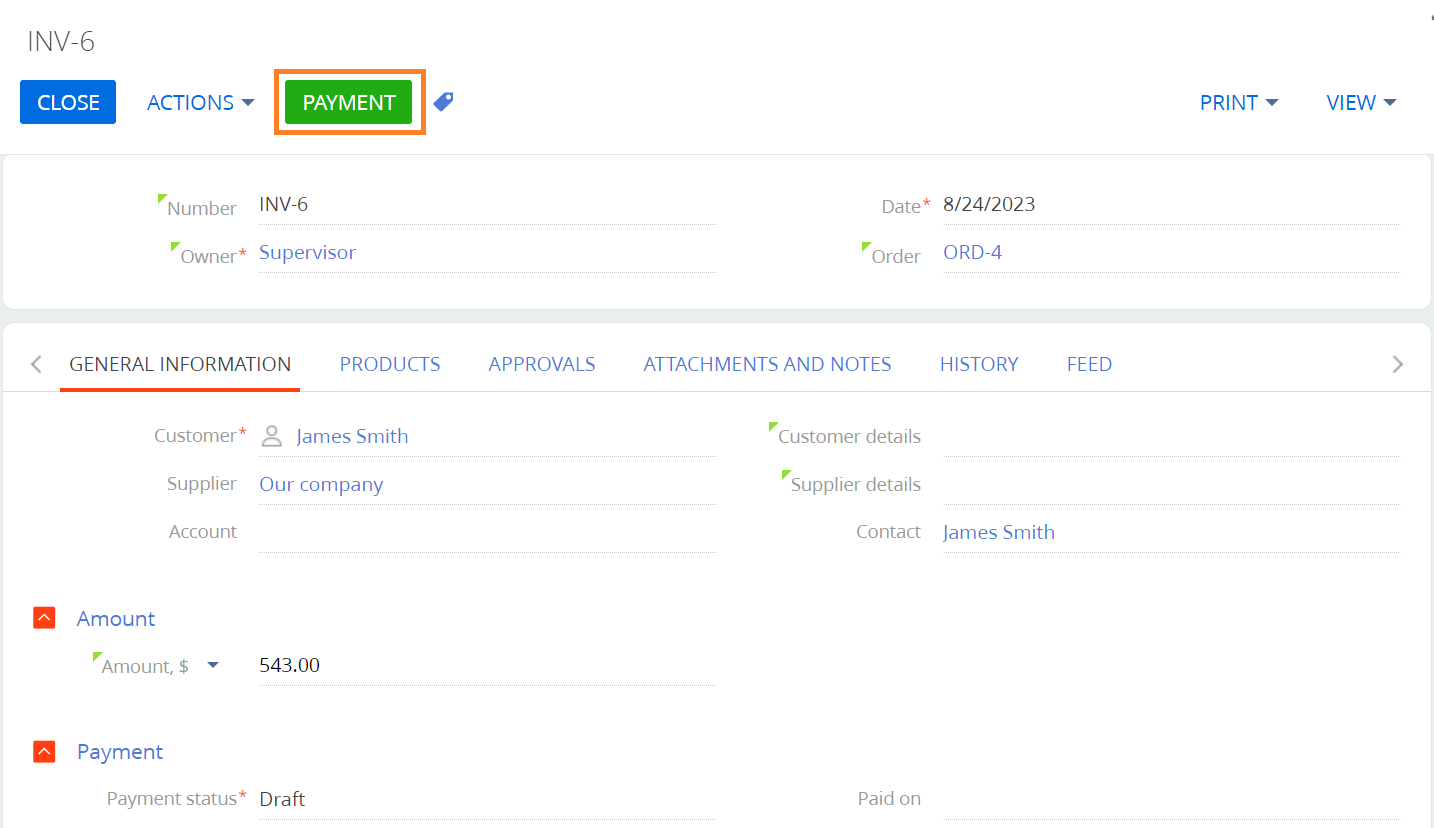
1. In the **Invoice** column, click the available Invoice link. For example, **INV-6**.



The Invoice page appears.



1. Click the **PAYMENT** button to request payment.

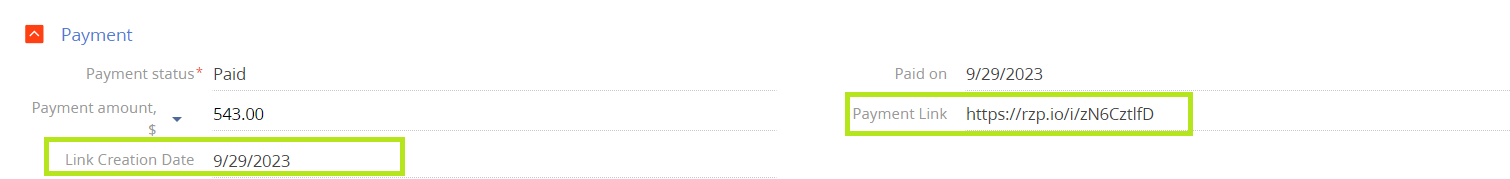


A payment link will be sent to the customer both on their Mobile and Email Id. The screenshot below is an example of the email sent with payment link.

A close-up of a message

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1. The **Payment link** and **Link Creation Date** boxes appear with a payment link and creation date. **Note:** Refresh to see the link and date.



1. Upon successful payment, the **Paid on** box is automatically updated with the payment date.
2. A close up of a white background

   Description automatically generated

## Razorpay via Payment Link

Once the Customer receives message via email or Text, they can click the Payment link and proceed with the payment.

How the payment link works for the Customer, here is an example of the email message with Payment link:

A close-up of a message

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**To proceed with the payment link**

1. In the message, click the payment link.

The Razorpay payment gateway page appears.

A screenshot of a computer

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1. Do the following:
   1. In the **Contact Details** section, Type your phone number and Email address.
   2. For the **Payment Type**, choose **Pay in full** or **Make payment in parts** option.
2. Click **Pay using Card**.

The Pay Via Cards section appears.

A screenshot of a credit card

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1. Click **Card**.

A screenshot of a card

Description automatically generated

1. Under **Add New Card**, enter your card details, and then click **Pay Now**.

A screenshot of a card

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1. If you want to save card details for the future transaction, click **Pay and Save Card** or else click **Pay without Saving Card**.

The ENTER OTP page appears.

1. Enter the OTP and click **Submit**.

A screenshot of a computer

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The Payment Completed page appears.

A screenshot of a software

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1. Check the Invoice for which the payment was requested, it should have the payment details updated.

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