

VERSION 1.0
DATE – 19/12/2024



PRESENTED BY: SWATI BISWAL

AIRPAY PAYMENT SERVICES PVT LTD

EMPRESSA 14, WESTERN EXPRESS HIGHWAY, SAHAR AIRPORT RD, ANDHERI EAST, MUMBAI

Zoho Handover Documentation

ABSTRACT

A Payment Gateway Connector allows Zoho Books merchants to receive payments from customers via gateways. Payment gateway integration can be developed as an extension and published in Zoho Marketplace.

This document explains the integration of airpay payment gateway with Zoho Books and the invoice generation process.

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VERSION HISTORY

VERSION #	IMPLEMENTED BY	REVISION DATE	APPROVED BY	APPROVAL DATE	REASONS
1.0	Swati Biswal	[19/12/2024]	[name]	[dd/mm/year]	First version of the Document

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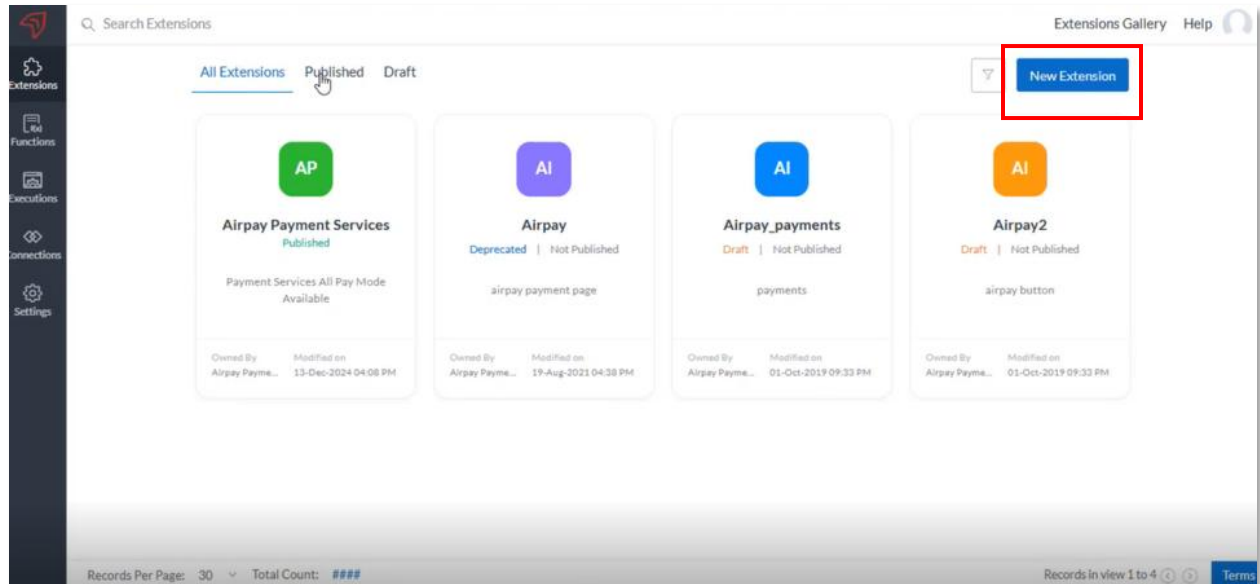
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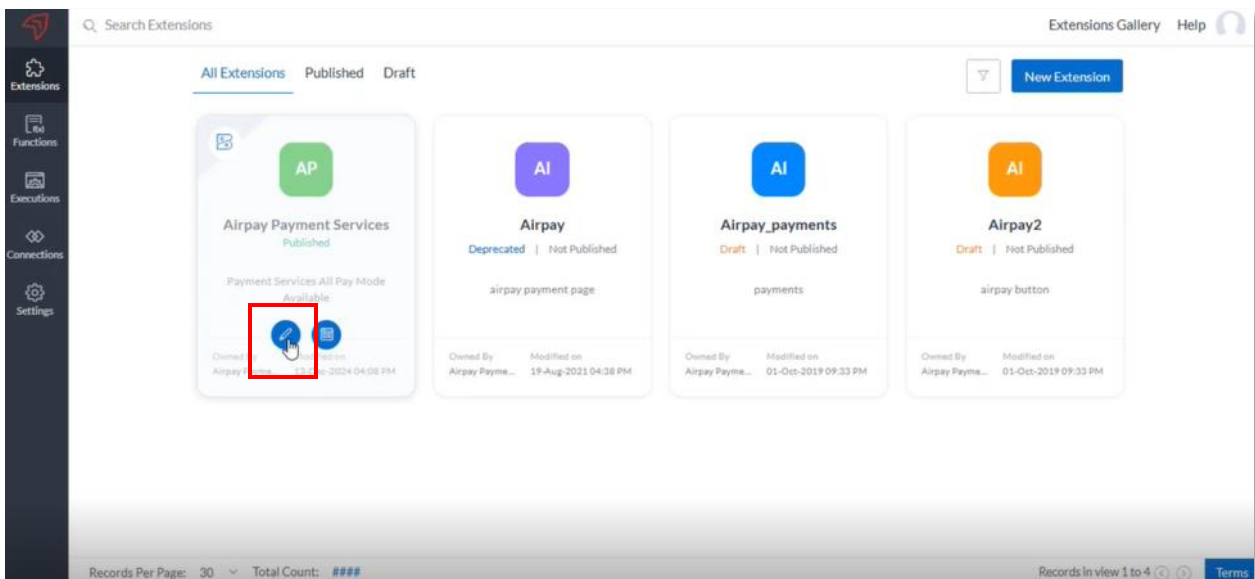
ZOHO

Airpay has to create an **airpay payment extension** in Zoho Books through which the customers can redirect to the airpay payment gateway page while making payments.

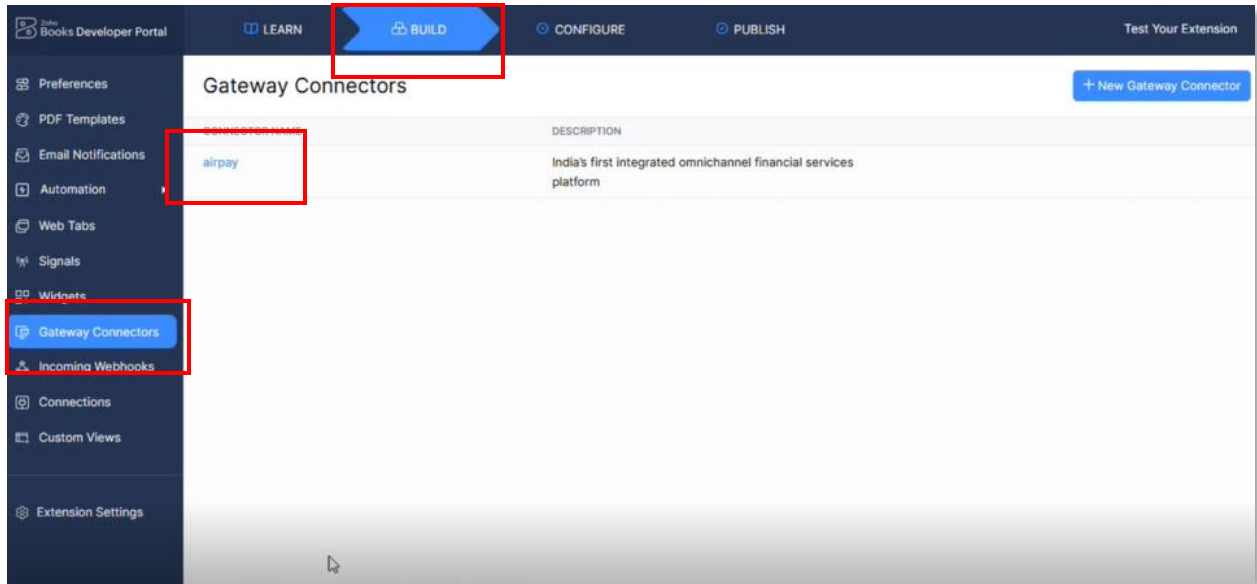
- Click **New Extensions** and proceed further to create the airpay payment services extension.



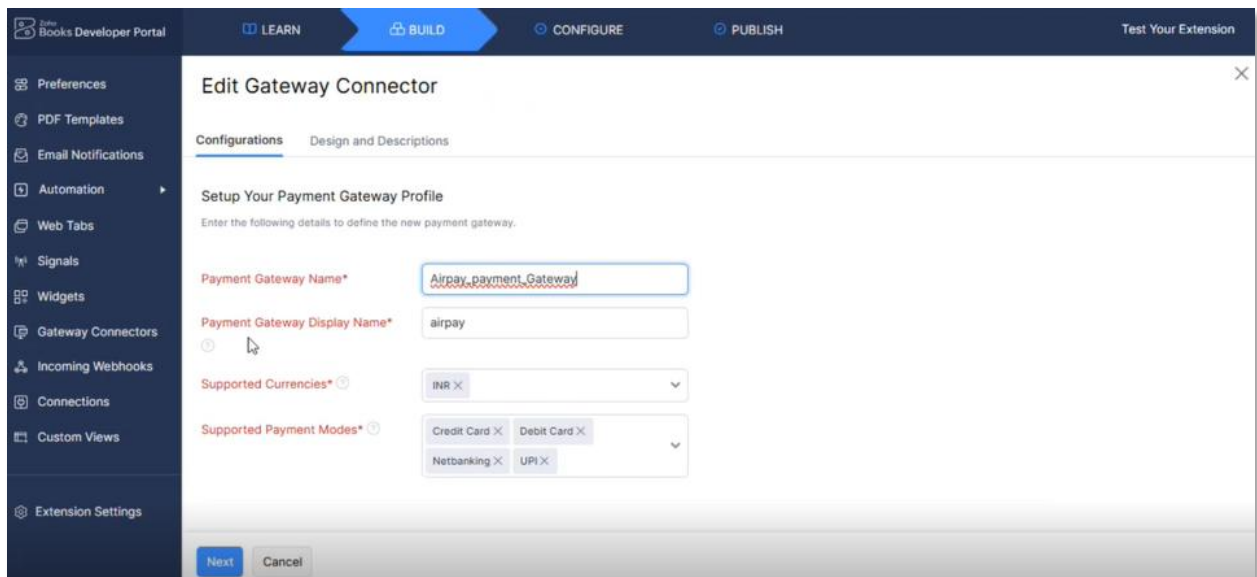
- Once the extension is created, click the **edit icon** as shown below.



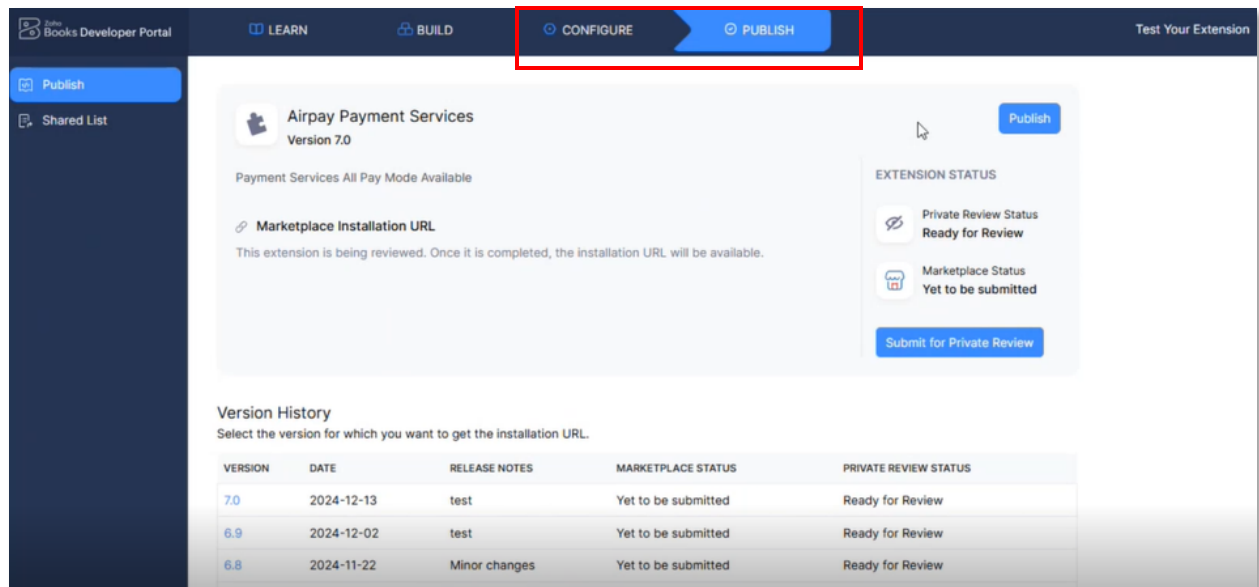
- Further, click **Build** and then click **Gateway Connectors** from the menu.
- Post that, click airpay to proceed further.



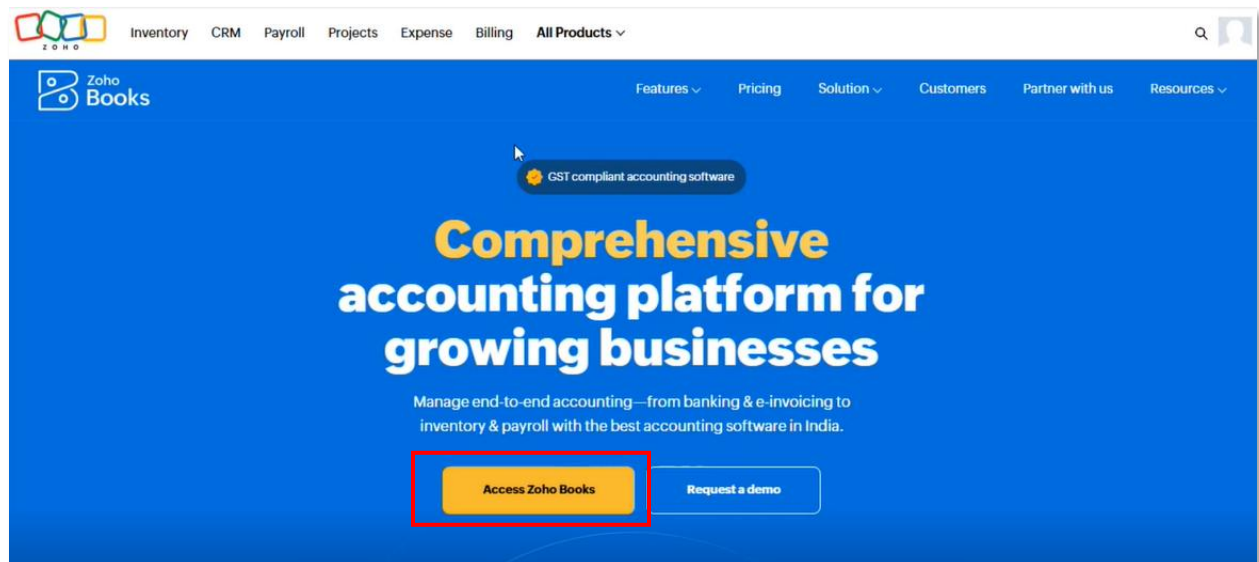
- Enter the gateway connector details such as payment gateway name, payment gateway display name, etc.



- Likewise, click **Configure** and **Publish** and proceed with the configuration and publish part respectively.

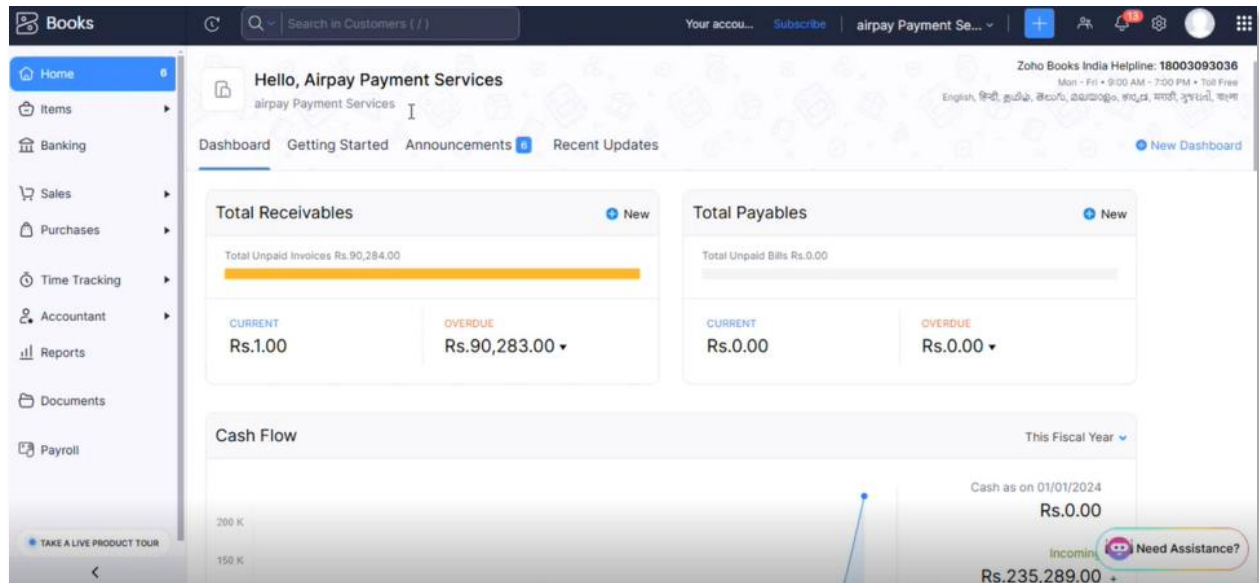


- Once the airpay extension is published, user will be able to create an invoice.
- Click the **Access Zoho Books** which gets redirected to its homepage.



HOMEPAGE

- Below is the homepage of the **Zoho Books**.



SALES

INVOICES

- Locate to **Sales> Invoices** from the menu to view all invoices.

The screenshot shows the 'All Invoices' page in Zoho Books. The sidebar menu has 'Invoices' highlighted under the 'Sales' section. The main content area includes a 'Payment Summary' with 'Total Outstanding Receivables Rs.90,284.00' and a breakdown of 'Due Today Rs.1.00', 'Due Within 30 Days Rs.1.00', and 'Overdue Invoice Rs.90,283.00'. Below this is a table of invoices with columns for DATE, INVOICE#, ORDER NUMBER, CUSTOMER NAME, STATUS, DUE DATE, AMOUNT, and BALANCE DUE.

DATE	INVOICE#	ORDER NUMBER	CUSTOMER NAME	STATUS	DUE DATE	AMOUNT	BALANCE DUE
04/08/2016	INV-000001	A001	Akshay Vanjare	DRAFT	04/08/2016	Rs.10.00	Rs.10.00
24/10/2024	INV-000004		Sidharth S	OVERDUE BY 54 DAYS	24/10/2024	Rs.18,000.00	Rs.18,000.00
05/11/2024	INV-000005		Sidharth S	PAID	05/11/2024	Rs.18,000.00	Rs.0.00
29/11/2024	INV-000006		Sidharth S	OVERDUE BY 18 DAYS	29/11/2024	Rs.36,000.00	Rs.36,000.00
29/11/2024	INV-000007	test001	Akshay Vanjare	PAID	29/11/2024	Rs.1,264.00	Rs.0.00
29/11/2024	INV-000008		Eidhose QA	PAID	29/11/2024	Rs.18,000.00	Rs.0.00

- Click **New** to create new invoice.

- Select the customer name from the dropdown as required.

New Invoice

Customer Name* Ms. Amrutha P S

BILLING ADDRESS SHIPPING ADDRESS
Add new address Add new address

Invoice# INV-000029

Order Number

Invoice Date* 17/12/2024 Terms Due On Receipt Due Date 17/12/2024

Salesperson Select or Add Salesperson

Save as Draft **Save and Send** Cancel

Make Recurring Total Amount: Rs. 0.00
Total Quantity: 0

- Select/enter the Item details and click **Save and Send**.

Salesperson Select or Add Salesperson

Item Table Scan Item Bulk Actions

ITEM DETAILS	QUANTITY	RATE	AMOUNT
phone111 Add a description to your item	1.00	1	1.00
Type or click to select an item.	1.00	0.00	0.00

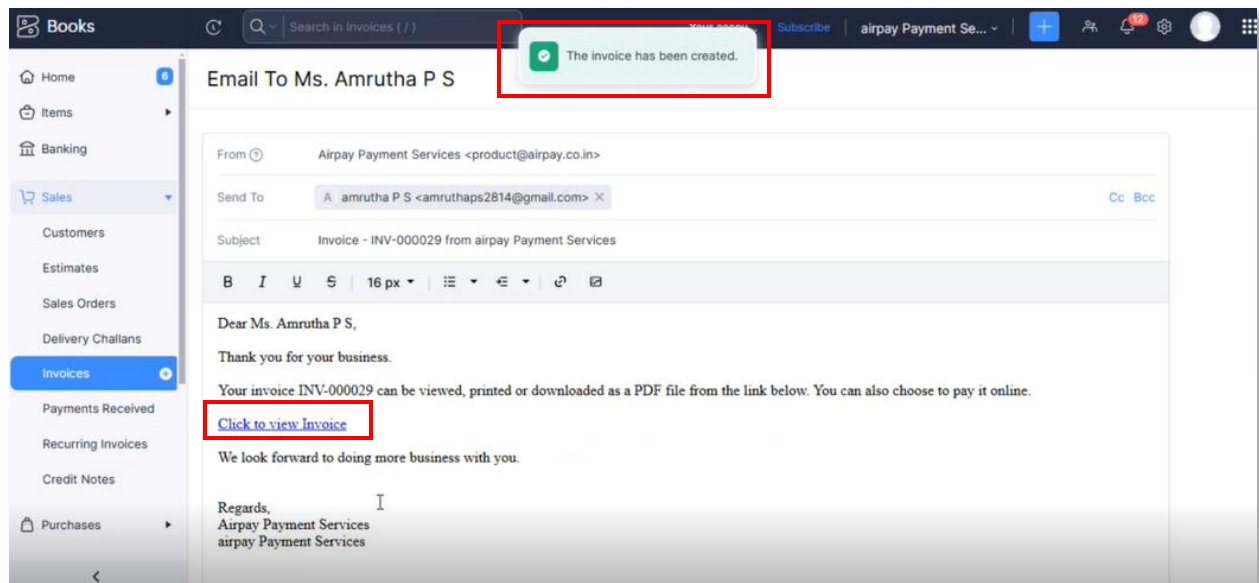
Add New Row Add Items in Bulk

Sub Total 1.00
Discount 0 % 0.00

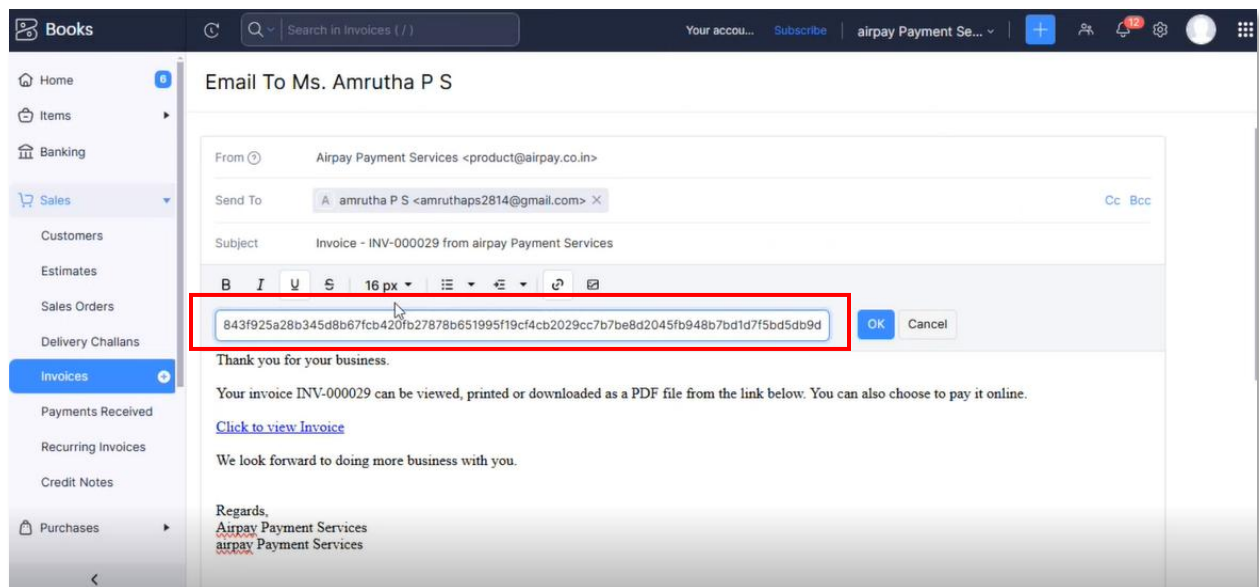
Save as Draft **Save and Send** Cancel

Make Recurring Total Amount: Rs. 1.00
Total Quantity: 1

- Further, the pop up message that gets displayed of invoice has been created and the mail gets generated which will be received by the customer.



- Click Send button to send the mail to the customer.
- To view invoice, click the link which will create the invoice link as shown below.



- Copy the invoice link and paste it in new tab which displays the page below.

airpay Payment Services

Total Payable Amount via Online Payments: Rs.36,002.00 [Pay Now](#)

Rs.1.00
Balance Due

Invoice #: INV-000029 Due Date: 17/12/2024

[Print](#) [Download](#) [Pay Now](#)

INVOICE
INV-000029

airpay Payment Services
Maharashtra
India

Balance Due
Rs.1.00

Invoice Date : 17/12/2024
Terms : Due On Receipt
Due Date : 17/12/2024

Bill To
Ms. Amrutha P S

- Click **Pay Now** and proceed further.
- Further, select the payment mode as required and click **Proceed to payment**.

airpay Payment Services

INV-000029 17/12/2024 Balance Due Rs.1.00

Credit Card Pay swiftly through your credit card.

Debit Card 100% secure payments through airpay

Net Banking

UPI

[PROCEED TO PAYMENT](#)

- Enter the UPI address (in case UPI is selected as payment mode) and click **Make payment**.

Order Id: 36936500000207062 | Amount: ₹ 1.00 +

UPI

Credit Card

Debit Card

Net Banking

PAY WITH UPI QR

UPI ID

PAY BY ANY UPI APP

Complete the payment by any UPI app.

G Pay

BHIM

MobiKwik

PhonePe

WhatsApp

Pay

BakPay

UPI

Enter your UPI address

* It is mandatory to link a bank account to use a UPI app.
Without linking a bank account you would not be able to make payments or receive payments.

MAKE PAYMENT

[How to complete this payment?](#)

- Select any one of the options and proceed further.

To complete your online payment, please follow the steps below:

Step 1: Click on the link sent by your bank through a SMS or in app notification

Step 2: Please open your preferred UPI app and approve the transaction by entering the MPIN/UPI PIN

QR Code is valid for **4:57** minutes

XXXXXXXXXXXX, We have sent a collect request

CANCEL TRANSACTION

MAKE PAYMENT

[How to complete this payment?](#)

airpay pay

Your transaction will appear on your bank or credit statement as 'airpay' or 'DemoLive - Airpay - Testing'. To Cancel this transaction, please [click here](#)

- Below page gets displayed on successful payment.

