

Razorpay Payment Gateway for Perfex CRM

Thank you for purchasing Razorpay payment gateway for Perfex CRM. The payment gateway will allow your customers to pay invoices using Razorpay with credit card and other banking methods that Razorpay provides.

Razorpay provides a quick and secure way of accepting payments from your customers. The Checkout form provides your customers a streamlined flow for initiating payments. The payment details submitted by the customer are secured and tokenized by Razorpay.

Installation.

The installation is straight forward you can install the payment gateway in just a couple of minutes.

1. From the downloaded .zip file located the **razorpay.zip** file and move it to your desktop.
2. Login as administrator in Perfex CRM admin area and navigate to **Setup→Modules**.
3. Click on “**Choose File**” and select the **razorpay.zip** file you previously moved to your desktop.
4. Click install.

After the module is installed, you will be able to see in the list of available modules below, click on the “**Activate**” button just below the module name.

If you have a module in a .zip format, you may install it by uploading it here.

• Upload Module

No file chosen

25

Module	Description
Database Backup Deactivate Database Backup	Default module to perform database backup Version 2.3.0
Goals Deactivate	Default module for defining goals Version 2.3.0
Menu Setup Deactivate Main Menu Setup Menu	Default module to apply changes to the menus Version 2.3.0
Razorpay Gateway Activate Uninstall	The easiest way to accept payments for businesses in India Version 2.3.0

Configuration

To configure Razorpay navigate to Setup→Settings→Payment Gateways and click on the Razorpay gateway, you will be able to see few options.

- **Key ID** – The API keys provided from Razorpay dashboard
- **Key Secret** – The API secret key provided from Razorpay Dashboard
- **Gateway Dashboard Payment Description** – The description that will be shown on your Razorpay dashboard and on the popup modal when the customer pays
- **Currencies** – Comma separated currencies to work with, refer to Perfex CRM documentation if you need more info about this.

Keep in mind that if you are using multiple currencies you need to contact Razorpay to allow your account to accept multiple currencies.

[<](#) [General](#) [Razorpay](#) [Authorize.net AIM](#) [Authorize.net SIM](#) [Instamojo](#) [Mollie](#)

Razorpay

Active
☒ Yes ☐ No

Label

Key Id

Key Secret

Gateway Dashbord Payment Description

Currencies (coma separated)

Selected by default on invoice
☒ Yes ☐ No

FAQ

How do I generate API keys?

- Please follow this link:

<https://razorpay.freshdesk.com/support/solutions/articles/11000060257-how-do-i-generate-the-api-keys-> in order to get more familiar with this.

What kind of API keys should I use, test or live?

If you want to test the integration, you should add and generate test API keys, after you finish the tests, you should update the API keys in Perfex CRM with the live keys provided from Razorpay.

More info can be found here: <https://razorpay.com/docs/payment-gateway/integrations-guide/key-generation/>

Razorpay is not shown as available payment gateway in the invoice HTML view?

This can happen if you didn't allowed Razorpay as allowed payment gateway for the invoice and the allowed currencies does not match the invoice currency.

Please refer to this explanation for more info: <https://help.perfexcrm.com/payment-modes-not-shown-on-invoice/>

Happy billing.