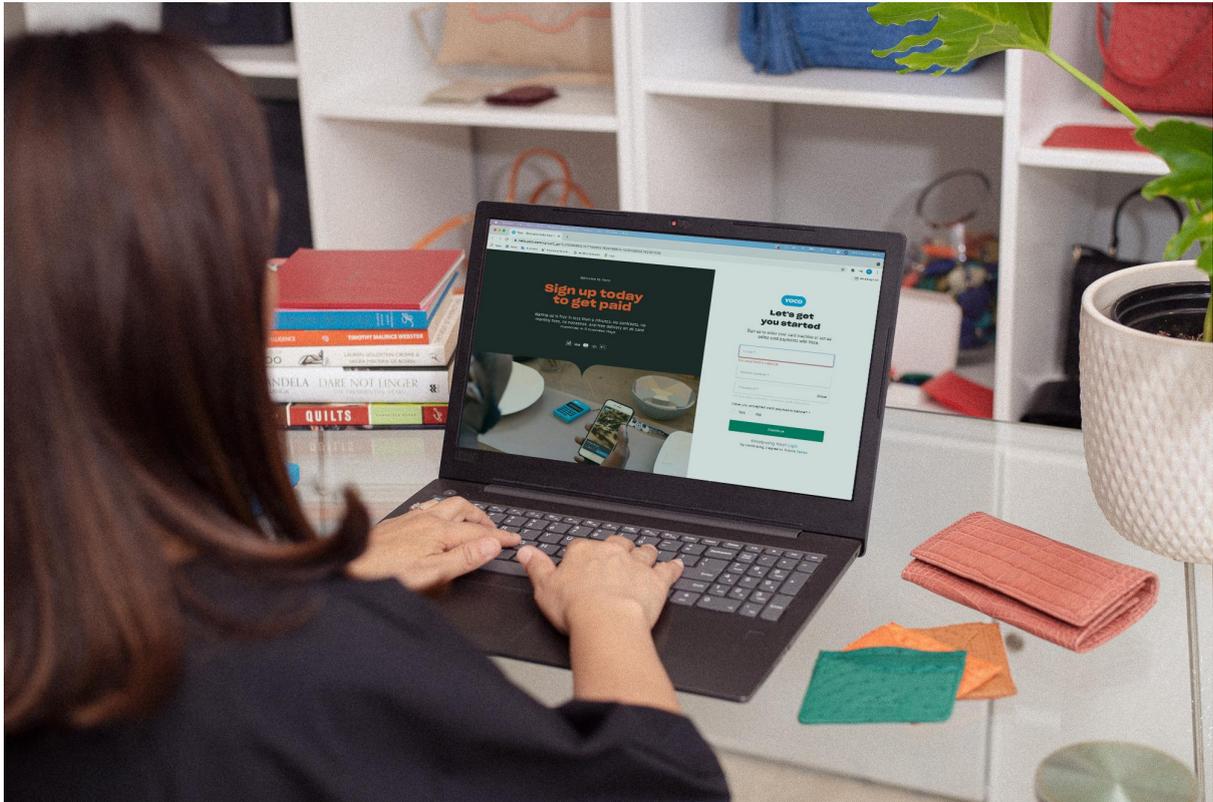


User Guide - Yoco Payments for Zoho Books



Yoco is an African technology company that builds tools and services to help small businesses get paid, run their business better and grow. We believe that by opening up more possibilities for entrepreneurs to be successful, we can help create more jobs, enable people to thrive and help to drive our economy forward.

We're proud partners of over 150 000 small businesses in South Africa.

The Yoco Payments for Zoho Books extension enables businesses to accept online payment settlements with [Yoco Payment Gateway](#).

Learn more about Yoco at <https://www.yoco.com/za/>.

Installation

Install the extension at

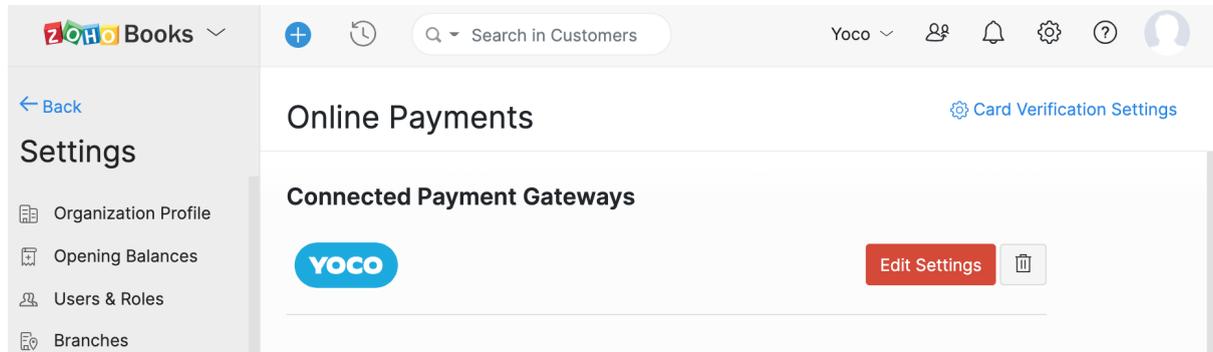
https://books.zoho.com/extension#/installprivateextension?name_space=b45e9d9b-afd4-4d49-a6eb-8ad4e034ff34&handle=umzvk&install_type=public.

Alternatively, you may search for “Yoco Payments for Zoho Books” in the Zoho Marketplace - <https://marketplace.zoho.com>.

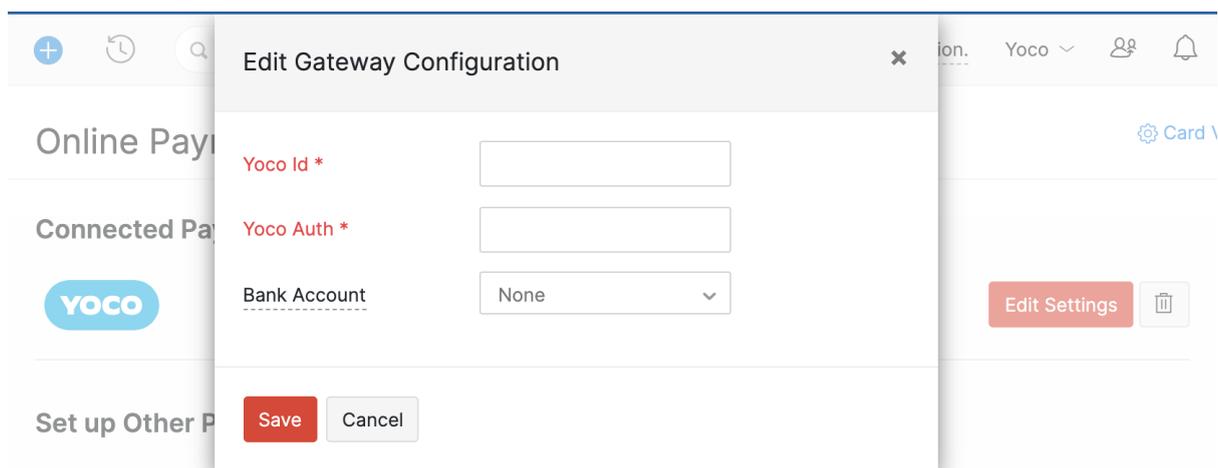
Configuration

Visit the payment gateway configuration page at

<https://books.zoho.com/app#/settings/onlinepayments/customer-onlinepayments>.



Click on *Edit Settings* to open the Gateway Configuration modal.



The **Yoco Id** and **Yoco Auth** are your API keys, which can be found in your [Business Portal](#). Go to Sell Online on the menu, and click on Payment Gateway.

Depending on whether you are testing, or are ready to go live and start receiving actual customer payments, you will use the Test or Live keys.

Copy the relevant public key to the Yoco Id field of the gateway configuration form. Likewise, copy the relevant secret key to the Yoco Auth field.

Save your changes.

That's it. You're ready to receive your first invoice payment with Yoco.

Creating An Invoice

The extension requires no alterations to your existing invoice workflow. Create invoices as you regularly would, and check the Yoco option in the online payment options settings for the invoice. By default, this section comes after the Terms and Conditions.

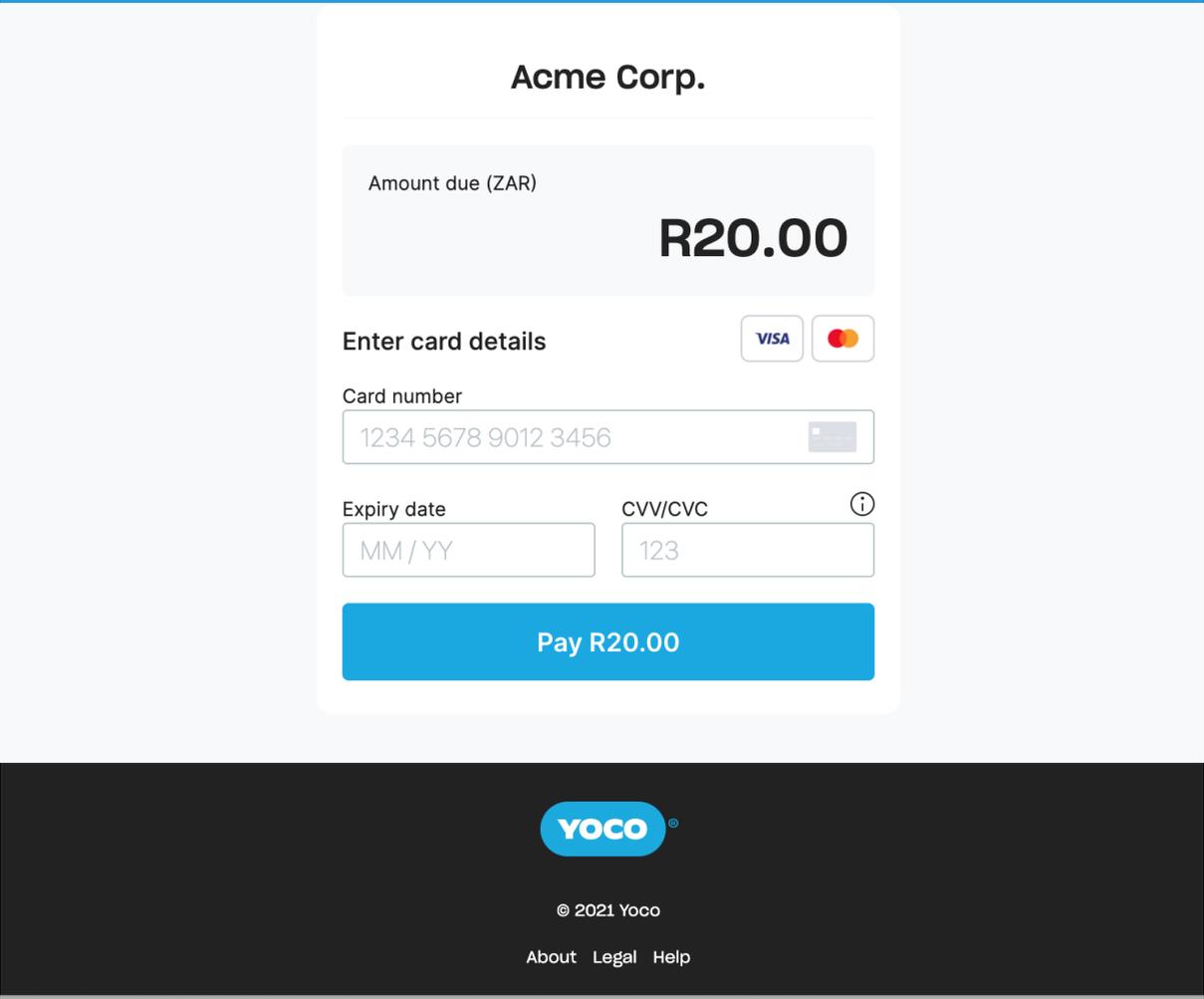
The screenshot shows the 'Create Invoice' interface in Zoho Books. On the left is a navigation menu with options like Dashboard, Items, Banking, Sales, Customers, Estimates, Retainer Invoices, Sales Orders, Invoices (selected), Payments Received, Recurring Invoices, and Credit Notes. The main area is divided into sections: 'Customer Notes' with a text box containing 'Thanks for your business.'; 'Terms & Conditions' with a text box for business terms; and 'Attach File(s) to Invoice' with an 'Upload File' button. Below these is a section for online payment options, where 'Yoco' is checked and 'Allow customer to make partial payments for this invoice.' is unchecked. A summary table shows 'Adjustment' as 0.00 and 'Total (R)' as 0.00. At the top right, it indicates 'This is a Test organization.' and 'Yoco' is selected as the payment gateway.

You may then send the invoice as normal, and your customers will automatically receive a payment action along with the invoice.

The screenshot shows an email client interface with a sidebar on the left containing 'Mail' (Inbox: 298, Starred, Snoozed, Sent, Drafts: 3) and 'Chat' (No conversations, Start a chat) and 'Rooms' (No rooms, Create or find a room). The main email content is titled 'Invoice #INV-000069' and is addressed to 'Dear Mrs. Paula Smith,'. The body text says: 'Thank you for your business. Your invoice can be viewed, printed and downloaded as PDF from the link below. You can also choose to pay it online.' Below this is a yellow-bordered box containing the following information:
INVOICE AMOUNT
R20.00
Invoice No: INV-000069
Invoice Date: 12 Aug 2021
Due Date: 12 Aug 2021
At the bottom of this box is a green 'PAY NOW' button.

The payment button takes them to Zoho's invoice payment screen where they may review the invoice before proceeding to make payment.

When a customer clicks "PROCEED TO PAYMENT", they will be redirected to Yoco where they may complete payment. No registration is required.



The screenshot displays a payment interface for Acme Corp. At the top, the company name "Acme Corp." is centered. Below it, a light gray box shows the "Amount due (ZAR)" as **R20.00**. Underneath, there is a section titled "Enter card details" with "VISA" and "MasterCard" logos. The form includes a "Card number" field with the value "1234 5678 9012 3456", an "Expiry date" field with the placeholder "MM / YY", and a "CVV/CVC" field with the value "123". An information icon (i) is located to the right of the CVV/CVC field. A prominent blue button labeled "Pay R20.00" is positioned below the form. The footer of the page features the YOCO logo, the copyright notice "© 2021 Yoco", and links for "About", "Legal", and "Help".

After successful checkout, the customer's invoice will be marked as paid.